



# **Blueprint Two**

## **Phase one digital services**

Adoption guide for carriers

Version 3.1, December 2024

# How to use this guide



## Purpose

- All firms will need to use **DPS digital services** to **continue trading in the market**.
- The guide provides details of the **compulsory changes required** to retain technical capability from cutover.
- It also contains a high-level overview of the **phase one processes that the market will need to follow**, including explanations of the **functionality changes taking place** as we move away from current portals and applications.
- It also sets out the **activities to be undertaken** (organised by people, process & technology) to **get ready to adopt phase one digital services**
- The guide provides resources to **facilitate workshops** with individuals who are **sponsoring, driving, and impacted by the change**.



## Version updates

- This version (3.1) has been amended to **reflect** the postponement of the 'go live' date, which at the time of releasing v3 was Oct 2024. Target dates are now replaced with **target phases**, to give flexibility, pending alignment to a revised launch date. There is **no new content** within this guide, so readers do not need to review the content for additional information or changes.
- These guides will continue to be **iterative** and will be updated at appropriate times throughout the programme.
- Version 3 of the **guide built** on version 2 (shared in October 2023) and contained all information provided in the previous edition, and included further updates provided at the market sessions\*. This content remains intact in this version.
- The changes to v3 **added detail** to the recommended practical activities:
  1. **Updated information includes new slides** covering International Premiums Orchestration Service (IPOS), International Claims Orchestration service (ICOS) direct submissions, accessing and using the portals, practicalities of using IPOS/ICOS and query management.
  2. **Call out updates** \*\* Lloyd's Outward Reinsurance Scheme (LORS), Proportional Treaty (PT), Delegated Authority (DA), Document Repository Service (DRS) (previously the IMR portal) and Knowledge Base.
  3. **Broker specific guide** covering open markets, Proportional Treaty and DA and LORS.
  4. **Activities section has been expanded, tailored** for market firm types, and specifically calls out **mandatory changes**

## Tips for using the guide



**Audience:** The guide is aimed at **those leading the implementation** of Blueprint Two phase one digital services within a market firm.



### Look out for the key on the slides:

By following the key on the slides, you will easily determine what is new content (denoted on each slide in the top right-hand corner) New content

and which activities have been updated since v2, denoted by **◆**  
**NB. New content refers to the content updates between v2 and 3 only.**



**Reading time:** Since the last release, there is a lot of updated and important content in this guide, hence It will typically take around **one hour to read** the whole guide. **NB. If you are not reading this for the first time, and merely reviewing the target phases, reading time will be less than 10 mins.**



**Quick read:** To reduce the reading time of the activity's sections, focus on the blue '**summary of change**' boxes and the red '**mandatory changes**' at the beginning of each section. It will then reduce your time to **20 minutes to read** the whole guide.



**Interactive design:** The guide is **interactive**. For optimal use, **avoid printing**.



**Feedback:** As always, **we'd appreciate your feedback** – please share with your engagement partner or email us at [BP2engagement@lloyds.com](mailto:BP2engagement@lloyds.com).



**Background reading:** A certain level of **prior knowledge is assumed**. For colleagues who are **new to Blueprint Two**, **background materials** can be found in [the background reading section](#) in the appendix.

## Executive summary for Carriers

This revised version (3.1), has been amended only to reflect the changes in key activity timelines, following the postponement of 'go live' which was originally planned for October 2024.

We have replaced target 'dates' for activities, with target 'phases'. This allows the reader to identify what activity should be undertaken to prepare for key phases, such as onboarding, testing and training. All other activities are those which require review or general consideration of your approach and is therefore considered '*ongoing*' activity. Where new content is flagged, this refers to the updated content between **v2 and v3** only. **Readers do not therefore need to review the full guide for content changes.**

This **latest version** of the phase one adoption guide, builds on existing content and updates the broader activities required to successfully adopt phase one. The guide is aimed specifically at Carriers and those leading the Blueprint Two implementation.



This guide



Market firms are also encouraged to

- Provided more **in-depth information** around mandatory and optional activities, together with guidance to enable the market to successfully adopt phase one
- Gives **new/updated** content around functionality and processes which were not available in version 2.
- Focuses on the '**what**'
- Should be read in conjunction with the training materials available on the Velonetic Education learning platform, which will guide users through the '**how**'
- **Complements the activities** in the market adoption readiness survey
- Links to the **technical information**, which is available on the website
- **Read and familiarise yourselves with the** information on the [Blueprint Two website](#) to assist with the deeper levels of technical information. Markets firms should review frequently the [What's New?](#) Page as this will be continuously updated.

## Key messages

We encourage market firms to read the whole guide, however you can use this summary below to guide you to the specific sections that are relevant for your business.

### Recap of key messages and mandatory changes:



#### All market firms who transact via messaging must:

- **Adopt** either standard or supported bespoke messages (including ACORD4ALL), without which your messages cannot be transmitted via the market gateway (ASG Adept)
- **Connect** to the market gateway (ASG Adept) to send and receive messages. Existing gateways will not be available
- **Retrieve** messages from a new SFTP site. Emailed messages will no longer be available



#### Those market firms who use the existing portals/applications today must be able to access the new Digital Processing Services (DPS) via:

- **International Premium Orchestration Service (IPOS)** to view premiums (via account enquiry) (all markets)
- **International Claims Orchestration Service (ICOS)** to view and/or agree a claims transaction and view documents (including those in the Document Repository Service (DRS))
- **Document Repository Service (DRS)** (previously the IMR) to view and upload documents
- **Lloyd's Outwards Reinsurance Scheme (LORS)** for outward reinsurance transactions
- **Knowledge Base** to view business knowledge information



#### All market firms must manage Velonetic queries via the DPS:

- **Access** ICOS to view and respond to premium and claims queries. Email queries are no longer possible



#### All market firms who rely on Velonetic reporting must access:

- **Access** the reporting portal (Qlik Sense) to retrieve their reports. Reports will no longer be emailed



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# Phased delivery: overview and timeline

01

This section outlines the phased delivery of Blueprint Two digital services, providing an overview of how the phases will interact with each other.



# How will the phased delivery work?

**Phase one:**

All firms will need to use phase one digital services to continue trading in the market. This is also a prerequisite to adopting phase two digital services, which enable the benefits of taking a fully digital approach.

**Phase two:**

Once phase one services have been adopted, phase two provides a wider set of services that utilises the new digital processing platform, enabling data-first interactions between brokers and carriers that supports risk, premium and claim agreements. Following phase one adoption, market firms can choose when and how to move to phase two digital services.

	Available in phase one	Available in phase two
Receive and send Electronic Data Interchange (EDI) messages	✓	✓
Access to a new digital processing services, replacing existing portals – transacting via IPOS (International Premium Orchestration Service) and ICOS (International Claims Orchestration Service) portals *	✓	✓
MRC v3** (Market Reform Contract version 3) submission ***	✓	✓
◆ Access to the new digital LORS portal and Document Repository Service (DRS) (previously IMR)	✓	✓
Core Data Record (CDR) created to support digital processing via International Risk Orchestration Service (IROS)	-	✓
Electronic Back Office Transactions (EBOT) / Electronic Claims Office Transactions (ECOT) messaging and query management	-	✓
Greater automation of processing; Velonetic technicians will continue processing, signing, and settling transactions using IPOS and ICOS	-	✓

\* Please note, there will be no access to IPOS for premium submissions in phase one.  
 \*\* MRC v3 submission is already available for market participants to use and can be submitted to carriers from phase one  
 \*\*\* MRC v3 is not applicable to DA



## 02

## Phase one changes

This section outlines the five key changes that need to be implemented by market firms to utilise the new digital processing services, and to continue transacting. The changes referenced include:

1. Project and change management planning and execution
2. Messaging
3. Market gateway (ASG Adept)
4. New digital market services
5. Reporting



# High-level overview of key phase one changes

1

Project and change management planning and execution

2

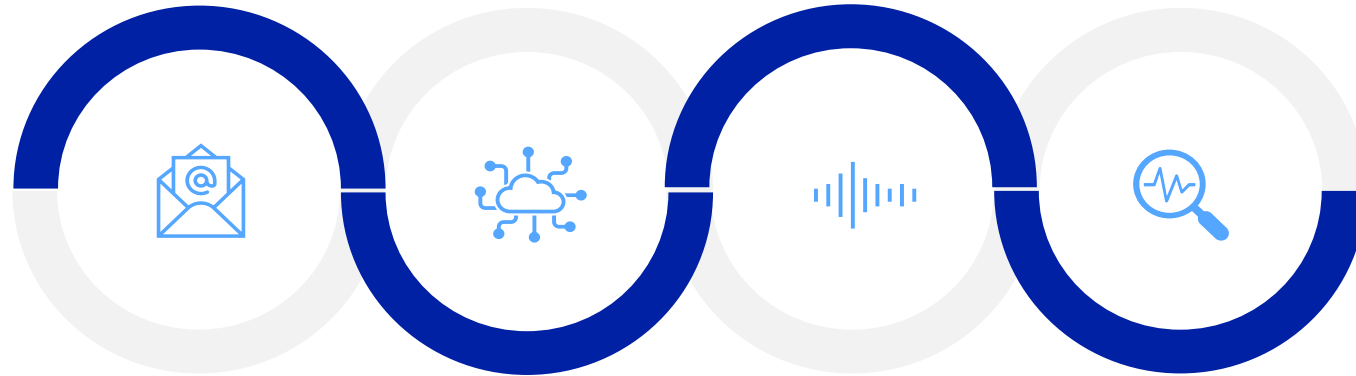
## Messaging

- ◆ No change is expected to the structure, format or data content of the standard EDI messages in digital phase one
- ◆ There are some customised messages which will continue to be supported
- ◆ There is a significant impact to unsupported customised/transformed messages

3

## Market gateway (ASG Adept)

- Requirement to make technology changes and to connect to the market gateway (ASG Adept) for all messaging, rather than the existing XAG/XDH/XFG gateways
- Technology support required to test connectivity to the market gateway (ASG Adept) and any impact on existing processes



4

## New digital services

- Market firms will have access to new digital processing services via IPOS and ICOS, replacing all existing portals and applications
- Previous market portals and applications will not be available
- ◆ Access to the new LORS portal replacing the existing portal
- ◆ Access to the new Document Repository Service (DRS) replacing the IMR portal

5

## Reporting

- There will be changes to how reporting is managed, introducing a self-serve approach
- All existing reports will be available through the Qlik Sense reporting tool

## Improved market processes

- Modern cloud-based infrastructure that will provide more operational resilience and stability.
- Future development will be faster and cheaper to deliver underpinned by these modern services.
- IPOS and ICOS enable faster processing of premiums and claims and provide more intuitive portals.
- ◆ Introduction of the new cloud-based LORS portal for the processing of outwards reinsurance
- ◆ Introduction of the new cloud-based Document Repository Service (DRS), replacing the IMR portal
- Faster query management can be achieved by moving to real-time, rather than batched processes.
- Introduction of the funded settlement facility via Vitesse, provides the possibility for faster payments to multiple third parties in a wider range of currencies.
- Reporting via a self-serve approach allows users to download reports from Qlik Sense in Excel/CSV/PDF.
- Data will be available immediately in the portals, enabling faster access to information.
- There is also a new Knowledge Base Portal

## Carrier-focused processes

This section sets out the high-level processes to be undertaken by carriers to adopt phase one digital services successfully.

Unlike in version 1 of the adoption guide, the following process slides are static and not interactive

03





# Overview of the new carrier-focused processes (introduced in v3)

This section covers the following new processes:

**Proportional Treaty FDO and statement submission**



The Proportional Treaty service provides a collection of services relating to the processing of reinsurance via Proportional Treaty. This process shows how the market can submit a Proportional Treaty Risk Submission, For Declaration Only (FDO) and Proportional Treaty statements via DRI (Document Repository Interoperability) or Document Repository Service (DRS) (IMR).

The Proportional Treaty service supports technical accounting, where customers can generate reports covering financial movements in premiums, claims and commissions, for a given accounting period, and processing of individual losses and claim movements, allowing Relevant Parties to exclude catastrophes/high value claims from the patterns of expected claims experiences. Submissions may be accompanied by an MRC v3 and supporting documentation. The data is captured and validated and where appropriate a Signing Number and Date (SND) is issued and market signing messages are notified to the relevant parties.



# Overview of the original carrier-focused processes

This section covers the following processes:

**Premium submission and signing**



◆ The premium submission and signing processes show how the market can submit premium advice submissions, including LPANs, LPAN FDO, binders (including risk bordereaux and premium bordereaux) either via DRI or the Document Repository Service (DRS)(IMR). Open Market submissions may be accompanied by an MRC, premium endorsements and supporting documentation, informing that the premium can be added to the system for processing. The data is captured and validated, queries raised and resolved, and a Signing Number and Date (SND) is issued.

**Premium settlement review and release**



▶ The premium settlement review and release processes show how the market can submit premium settlement release notifications via the RESETT message or IPOS (International Premium Orchestration Service), informing that the premium is ready for settlement and can be assigned a payment date. The data is validated and cross referenced with the corresponding premium submission(s) before notifying relevant parties and passing all information into the relevant settlement service.

**Claims submissions and agreement**



◆ The claims submission and agreement processes set out how users can submit LIMCLMs (London Insurance Market Claims Messages) / claims bordereaux and supporting documents via DRI or ICOS. Submissions will include a UCR (Unique Claim Reference) and UMR (Unique Market Reference). The data will be validated, against the MRC/Binding Authority Agreement and cross referenced and sent to the carriers to agree/deny claim settlement and forward onto the settlement service.

**Claims settlement submission and release**



▶ The claims settlement submission and release processes show how the market can triage the claims, send to the carriers to query/agree/deny claim settlement. The data will be validated and cross referenced with the corresponding claim submission(s) before notifying relevant parties and passing all information into the relevant settlement service. Once the claim is ready for settlement it can be assigned an actual payment date (APD) and forwarded onto the settlement service.

# Changes to the Proportional Treaty FDO & statement submission process

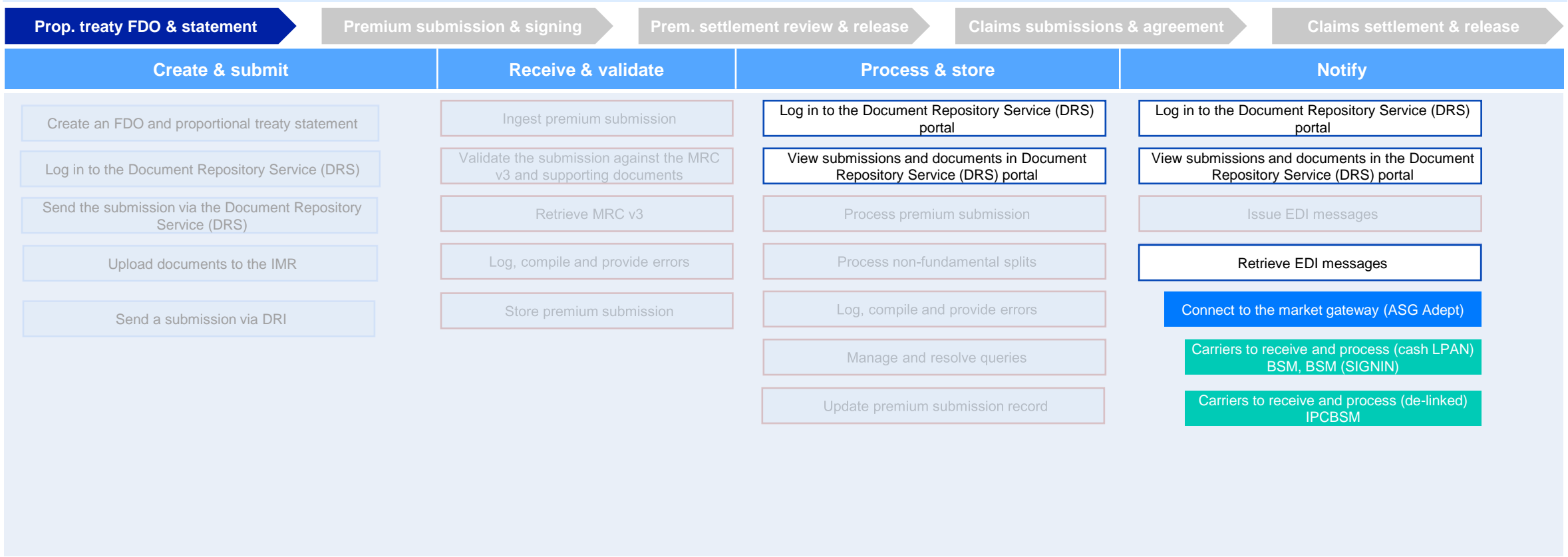


## Summary of changes for proportional treaty brokers

The Document Repository Service (DRS) (IMR) will be available for proportional treaty, so carriers can view submissions/associated documents as they currently do today, but carriers will need to access the new portal. See [Document Repository Service \(DRS\)](#) slides. There is a new application for prop treaty, but this will be managed internally by Velonetic (see [proportional treaty slides](#)).

All queries will be directed to the brokers, as they are today. All prop treaty carriers will need to connect to the market gateway (ASG Adept) (see [market gateway slides](#)) to send and retrieve messages. All standard messages will be supported but firms should review the specifications and understand if any of their messaging will be impacted (see [messaging slides](#)).

Details of activities required to adopt these new ways are working are shown the activities section of this guide



Change type key: ■ Message capabilities ■ Technology changes ■ Process changes

Process owner key:  Velonetic process  Carrier process - No change  Carrier process - Change required

Classification: Unclassified

# Changes to the carrier premium submission & signing process



## Summary of changes for carriers

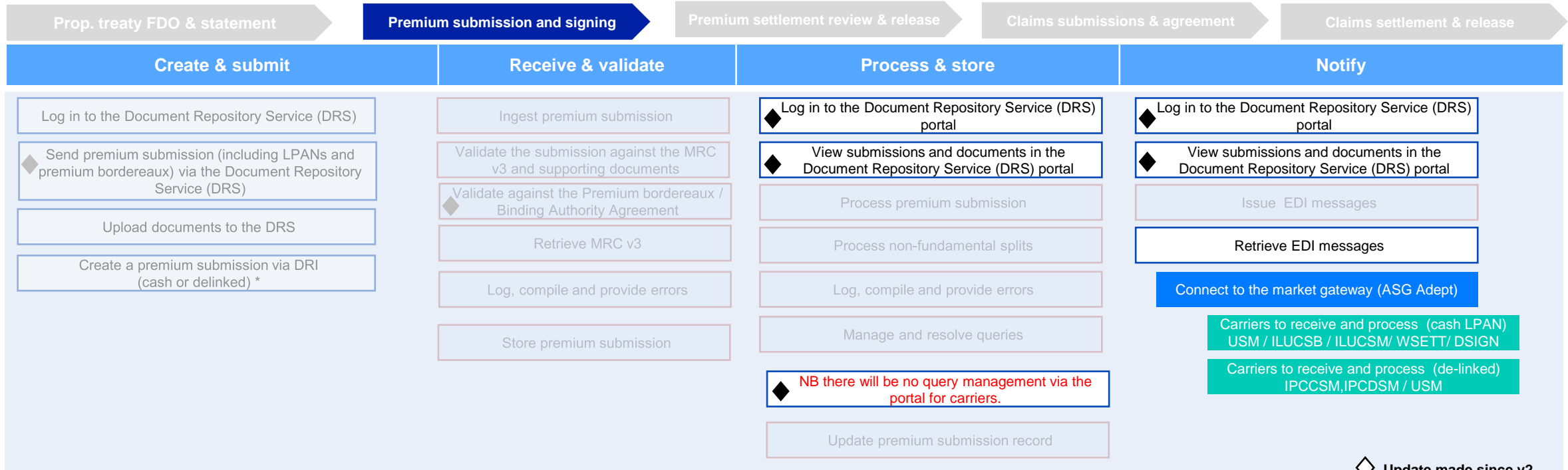
◆ Carriers can view submissions and associated documents via the Document Repository Service (DRS) as they do today via the IMR. Carriers will however need to access the new portal. See [Document Repository Service \(DRS\)](#) slides.

Carriers will need to connect to the market gateway (ASG Adept) (see [ASG gateway](#) slides) to retrieve and process signing messages such as (cash LPAN) USM, ILUCSB, ILUCSM, IPCCSM, IPCDSM and WSETT/ DSIGN. All standard messages will be supported but firms should review the specifications and understand if any of their messaging will be impacted (see [messaging](#) slides). For DA the Document Repository Service (DRS) will be available, so carriers can view submissions/associated documents as they currently do today via the IMR.

Queries will be managed via the broker as they are today (see [query management](#) slides). If the broker needs to raise a query to the carrier they will do so via email, so there is no requirement for the carrier to use IPOS for queries. Carriers can still use IPOS for account enquiry but will no longer need to access IPOS for query management

**NB** For carriers there is no separate journey, as the submission and signing process for DA is the same as Open Market (see [delegated authority](#) slides).

**Details of activities required to adopt these new ways are working are shown the activities section of this guide**



◆ Update made since v2



# Changes to the carrier premium settlement review & release process



## Summary of changes for carriers

◆ All carriers will need to connect to the market gateway (ASG Adept) (see [ASG gateway](#) slides) to retrieve and process settlement messages such as ILUCSB, ILUCSM, WSETT and DSIGN. All standard messages will be supported but firms should review the specifications and understand if any of their messaging will be impacted (see [messaging](#) slides).

Queries will be managed via the broker as they are today. If the broker needs to raise a query to the carrier they will do so via email, so there is no requirement for the carrier to use IPOS for queries. Carriers can still use IPOS for account enquiry but will no longer need to access the portal for query management. (see [query management](#) slides)

Details of activities required to adopt these new ways are working are shown the activities section of this guide



◆ Update made since v2

# Changes to the carrier claims submissions & agreement process



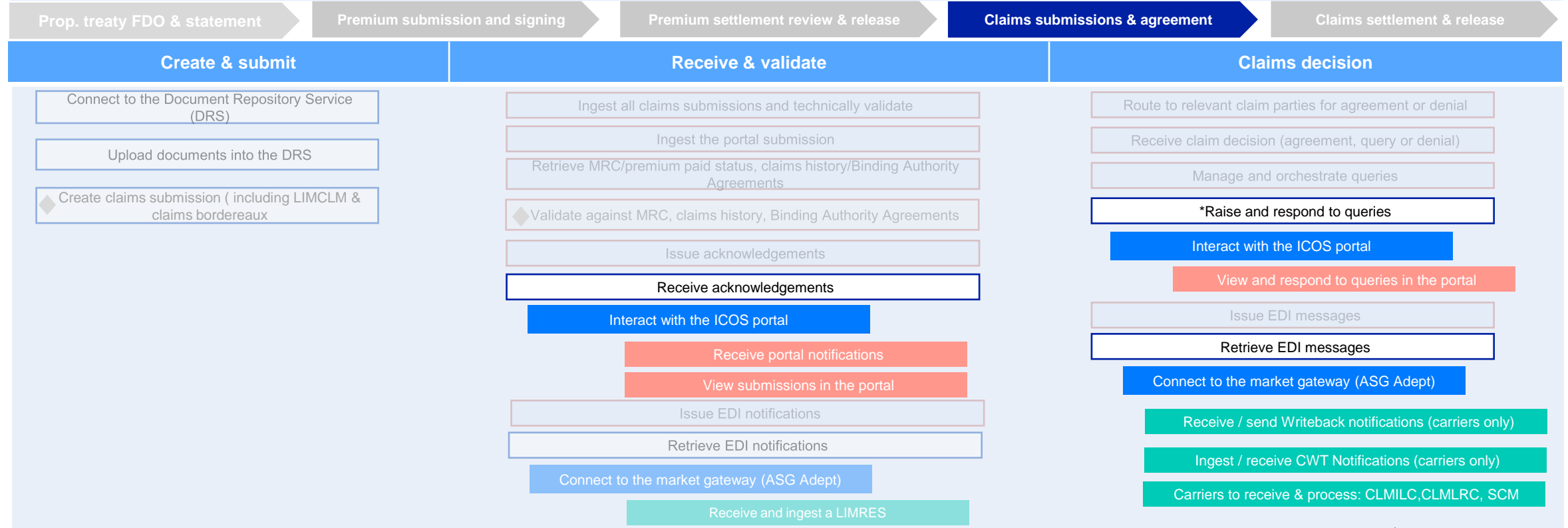
## Summary of changes for carriers

All carriers will have to connect to the market gateway (ASG Adept) (see [ASG gateway](#) slides) to be able to receive and send Writeback notifications, to ingest and receive CWT notifications and to receive and process CLMILC, CLMLRC and SCM messages. All standard messages will be supported but firms should review the specifications and understand if any of their messaging will be impacted (see [messaging](#) slides).

Carriers can access ICOS to view /agree claim submissions and to send, view and respond to queries. Carriers can also initiate queries as they do today in Writeback (see [query management](#) slides).

For DA, Velonetic checks against Binding Authority Agreements will continue to exist. **NB** There is no separate journey shown, as the claim's submission process is the same as Open Market. (see [delegated authority](#) slides).

Details of activities required to adopt these new ways are working are shown the activities section of this guide



# Changes to the carrier claims settlement & release process



## Summary of changes for carriers

To continue receiving and processing messages with actual payment date (e.g. CLMILC, CLMLRC), carriers will need to connect to the market gateway (ASG Adept). (see [ASG gateway](#) slides). All standard messages will be supported but firms should review the specifications and understand if any of their messaging will be impacted (see [messaging](#) slides). In addition, carriers are also able to log into the ICOS portal and view the notifications/ statuses.

Details of activities required to adopt these new ways are working are shown the activities section of this guide



Process claim	Receive & release	Notify
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Technical processing and advise Relevant Claims Parties (Lloyd's only)</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Create a claims settlement and release notification</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Assign a payment date</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Aggregation and netting off (if applicable)</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Settlement scheduling</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Record settlement activity and financial information</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Create a settlement record</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Send a payment instruction to payment provider</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Nonparticipant bank management (company market only)</div> <div style="border: 1px solid #ccc; padding: 5px;">Currency conversion (Lloyd's Market only)</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Issue EDI messages with assigned payment date</div> <div style="border: 2px solid #007bff; padding: 5px; margin-bottom: 10px;">Retrieve EDI messages with actual payment date</div> <div style="background-color: #007bff; color: white; padding: 5px; margin-bottom: 10px;">Connect to the market gateway (ASG Adept)</div> <div style="background-color: #00b050; color: white; padding: 5px; margin-bottom: 10px;">Carriers to receive and process: SCM, USM, LIMCLM, (CLMILC, CLMLRC), ILUCSB, ILUCSM), WSETT, DSIGN</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Log into the ICOS portal</div> <div style="border: 2px solid #007bff; padding: 5px; margin-bottom: 10px;">Receive notifications</div> <div style="background-color: #007bff; color: white; padding: 5px; margin-bottom: 10px;">Interact with ICOS portal</div> <div style="background-color: #ff7f50; padding: 5px;">View progress in the ICOS portal</div>

Change type key: ■ Message capabilities ■ Technology changes ■ Process changes

Process owner key:  Velonetic process  Carrier process - No change  Carrier process - Change required

Classification: Unclassified



**04**

## Carrier adoption activities

This section sets out the recommended practical activities to be undertaken for carriers to adopt phase one digital services successfully.



# Project & change management: adoption activities (1/3)

Foster collaboration, alignment, and commitment among stakeholders impacted by the change



## Summary of the change

- The adoption of phase one is a **mandated single market** event and every firm needs to be able to cut over safely to enable continuous trading.
- Many of the phase one activities and **requirements are mandatory**; including technology, messaging and process changes.
- To enable effective preparation and adoption of digital phase one services, it is recommended that a **specific project team** is mobilised within your firm. The project will impact people as well as processes, so the deployment team mobilised should include cross-functional participants.
- The project should also have a nominated sponsor, dedicated resourcing and an agreed budget.



## Additional information

- ◆ Phase one is being delivered in a way which will cause minimal impact to the market, and hence it is anticipated that market firms will **continue to use the same channels** as they do today, making only the mandatory changes that will be discussed in this guide.
- ◆ Using the new digital technology will require some technology, processes changes and perhaps changes to **roles and responsibilities**. Change aspect will also need to be factored into your plans.
- ◆ Recognising that no single market approach can be mandated, market firms must consider their **own approach** to adoption in line with their firm's strategic goals
- ◆ Phase one digital may provide the opportunity for the market to **evolve and adapt** their current target operating models, as digital technology paves the way for different ways of working

### Topic

### Activity

### Target outcome

### Target phase

### People

### Process

### Tech

Awareness & commitment

- Identify all stakeholders that need to support and drive the change, or who are impacted by the change including: executive sponsors, senior leaders, team leaders and users of the existing portals and/or support messaging.
- Hold regular meetings with identified stakeholder groups to seek updates on progress, drive activity forward and reinforce the change benefits.
- Ensure identified stakeholder groups understand the impact of the deployment plan on people, processes and technology.

- This stakeholder list will identify all individuals to be involved in or regularly informed of Blueprint Two readiness and adoption progress.
- A stakeholder analysis should be completed [\*\(template available if required\)\*](#).
- Regular meetings and communications foster collaboration, alignment, and commitment among stakeholders impacted by the change.
- Key stakeholders understand benefits and changes needed and are ready to adopt.
- A change impact assessment should be completed [\*\(template available if required\)\*](#).

Ongoing



Ongoing



Ongoing






# Project & change management: adoption activities (2/3)

Decide on your digital path and plan your adoption roadmap

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Overall adoption strategy & approach	<ul style="list-style-type: none"> <li>Ensure that market firms are aware of the mandatory changes and clearly understand those changes which are compulsory and those where you have choices.</li> <li>Using the tools supplied in this guide, and in accordance with activities outlined, plan your adoption roadmap.</li> </ul>	<ul style="list-style-type: none"> <li>The tools in this guide will help inform your adoption strategy and will clarify the pros and cons of differing approaches.</li> </ul>	ongoing		✓	✓
	<ul style="list-style-type: none"> <li>Identify all stakeholders that need to be involved in the decision-making, including senior leaders, executive team, operations, finance, HR, etc.</li> <li>Document the strategic changes required and the downstream implications of your approach to adoption.</li> </ul>	<ul style="list-style-type: none"> <li>This information will help you to plan your adoption roadmap, in a controlled and supported manner.</li> </ul>	ongoing	✓	✓	
	<ul style="list-style-type: none"> <li>Liaise with your vendor to ensure they are aligned to any changes and that they can deliver on any technology requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Liaising with your vendors will ensure that your proposed adoption plan is compatible with their development timescales.</li> </ul>	ongoing			✓
	<ul style="list-style-type: none"> <li>Gain an understanding of the benefits that your adoption approach could yield in phase one and beyond, considering how these benefits could grow with phase two adoption</li> <li>Document any benefits using a change impact assessment tool and change plan (templates provided for assistance).</li> </ul>	<ul style="list-style-type: none"> <li>This activity will ensure that the approach will realise your target goals.</li> <li>This will help ensure that you encompass all impacted activity, to inform/ratify your approach</li> <li>A change impact assessment should be completed <i>(template available if required)</i>.</li> </ul>	ongoing		✓	
	<ul style="list-style-type: none"> <li>Using the tools supplied in this guide, assess and validate any role and responsibility changes and organisational redesign opportunities that become available as part of phase one digital services adoption.</li> <li>Understand that working digitally will be different to how people work today (e.g. requirement to work with portal notifications and new query management tools).</li> <li>Consult with your HR team to assess any cultural impacts, crafting a plan to address change and stakeholder communications</li> </ul>	<ul style="list-style-type: none"> <li>This should yield a validated HR plan, allocation of an appropriate budget, and plan/methodology to manage the people aspect of the change.</li> </ul>	ongoing	✓		

# Project & change management: adoption activities (3/3)


Develop a change plan, and assess any organisational redesign opportunities arising as part of phase one adoption

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Target Operating Model review	<ul style="list-style-type: none"> <li>◆ Using the 'to be' process maps that you will create (or have already created) in preparation for phase one adoption, consider whether your current business would benefit from a revised Target Operating Model as a result of any new options that you will have available e.g. for claims processing/ query management</li> </ul>	<ul style="list-style-type: none"> <li>— Understand the benefits that could be unlocked through the implementation of a new target operating model, along with the longer-term downstream impacts for phase two adoption.</li> </ul>	ongoing	✓	✓	✓
Planning and resourcing	<ul style="list-style-type: none"> <li>— Revise your adoption change plan, detailing the activities, owners and due dates (if necessary).</li> </ul>	<ul style="list-style-type: none"> <li>— A project team in place, and a plan with a sufficient level of detail to manage and track adoption activities to achieve the go-live.</li> <li>— A change plan should be completed (<a href="#">template available if required</a>).</li> </ul>	ongoing	✓		
	<ul style="list-style-type: none"> <li>— Establish project reporting to update stakeholders on progress of adopting phase one digital services.</li> </ul>	<ul style="list-style-type: none"> <li>— Improved transparency and informed decision-making due to a sufficient understanding of the projects progress.</li> </ul>	ongoing		✓	
Budgeting	<ul style="list-style-type: none"> <li>— Revise cost estimates associated with digital phase one adoption (e.g. contingency for moving from customised to standard messages, project manager/business analyst resources, training and testing costs, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>— This will lead to a validated budget allocation proposal (BP2 business case).</li> </ul>	ongoing	✓	✓	✓
	<ul style="list-style-type: none"> <li>— Obtain approval from project sponsors for any revised budget allocation proposal that outlines the budget breakdown for Blueprint Two phase one digital services.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure sufficient budget and resources will be made available in 2025 to meet any development or project costs.</li> </ul>	ongoing	✓		




# Market gateway (ASG Adept) adoption activities (1/1)

Ensure connectivity to the new market gateway (ASG Adept) for all messaging



### Summary of the mandatory changes

- Requirement to **connect to the market gateway** (ASG Adept) for all messaging, rather than the existing XAG/XDH/XFG gateways.
- Several technology **changes need to be** implemented and tested to ensure connectivity:
  1. The messaging origination point will change
  2. The Secure File Transfer Protocol (SFTP). The **file collection locations** will change
  3. The **security model** will change requiring a new set of user profiles
- Ahead of testing you, or your service provider, will be provided with a **new IP address or URL**, along with a username, password and any other credentials necessary.



### Additional information

- Connecting to the new market gateway (ASG Adept) is a relatively simple task. Many firms did something similar when the IMR was migrated earlier in 2023.
- Look out for details on how to interface with the Velonetic digital processing services ahead of customer testing onboarding
- To access the ACORD solutions group's adept integration guide, sign in with your credentials on the login page. If not registered, sign up. Once logged in your organisation should already have access to ASG's Blueprint Two page; if not click submit a request and complete the form. If any difficulties in accessing the Blueprint Two documentation with your login, contact your engagement partner for assistance.

◆ Please refer to the connectivity guides available on [website](#)

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	<ul style="list-style-type: none"> <li>◆ All market firms <b>must connect</b> to the market gateway ( ASG Adept) to ensure that you are able to send and receive messages.</li> <li>◆ All market firms must make <b>the above technology changes</b> for phase one, to ensure that you are still able to send and receive messages</li> </ul>	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Onboarding			✓
New end point address and credentials	<ul style="list-style-type: none"> <li>— Share the credentials with your IT team or service provider, who are responsible for reconfiguring your systems and testing the new gateway</li> </ul>	<ul style="list-style-type: none"> <li>— This will provide the relevant technology team with the information required to make any relevant changes.</li> </ul>	Onboarding			✓
New security authentication process	<ul style="list-style-type: none"> <li>— Obtain your new market gateway security credentials to connect to the market gateway (ASG Adept). This will be ahead of customer testing to ensure firms are ready in time.</li> <li>— Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one go-live. <i>Refer to the <a href="#">ASG Adept website</a> to access the integration user guide.</i></li> </ul>	<ul style="list-style-type: none"> <li>— This will enable of the connection to the market gateway (ASG Adept).</li> <li>— This will enable users to login to the market gateway (ASG Adept) after phase one go-live.</li> </ul>	Onboarding			✓
Changes to the file collection locations	<ul style="list-style-type: none"> <li>◆ Work with your IT team/service provider to ensure they have made the relevant updates to be able to collect data from the new SFTP location.</li> <li>◆ Test your connectivity</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that data file collection can continue.</li> </ul>	Testing			✓

# Messaging adoption activities (1/4)

Assess the impact on messages (if any)



## Summary of the change

- ◆ All **standard messages** will be supported.
- ◆ Firms should review the specifications to understand if their messaging will be impacted. If you use **customised messages**, you should already be aware of those that will continue to be supported.
- ◆ Certain messaging customisations are not be supported going forward. If your messages fall into this category, you are encouraged to **move away from unsupported** bespoke messaging.
- ◆ If you are moving away from a bespoke unsupported message to either a standard or supported bespoke message, ensure the **new payload meets your requirements**.
- ◆ Vendors should review the messaging **technical specifications** to make any amendments required to produce or consume impacted messages.
- ◆ Messages **will no longer be emailed**. Market firms must review their file collection locations.
- ◆ Market firms must review and understand the details for **message sequence numbers** as these will not be continuous between the mainframe and the digital platform.
- ◆ Formats for all **Signing Numbers and Dates** will be retained. Internal ranges will not be retained for Lloyd's. For Lloyd's market, you must be review and understand the implications.



## Additional information

- We recognise that any single data field change may have a knock-on impact on your processing or require assessment of existing systems to understand if changes are required.
- All messages will **go to and from the market gateway (ASG Adept)**, rather than the existing gateways.
- ◆ Be aware that **ACORD4 ALL(A4A) will be sunset**; carriers are therefore not encouraged to move from an unsupported message to A4A messages in the interim phase.
- ◆ Carriers currently using A4A should look to **adopt ACORD** messaging for phase two.
- ◆ Writeback message **sequence numbers** will be continuous between the mainframe and the digital platform and will therefore cause no detrimental impacts on users.
- ◆ The programme is being run on an agile basis so there remains a risk that specifications for messages may need to be altered to align with the build of the digital processing services. Any further changes will be minor, and you will be notified as soon as possible.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	<ul style="list-style-type: none"> <li>◆ All market firms must                             <ul style="list-style-type: none"> <li>◆ <b>Connect</b> to the <a href="#">market gateway</a> (ASG Adept) to ensure that you are still able to send and receive messages.</li> <li>◆ Make <b>the technology changes</b> to ensure that you are still able to send and receive messages. (see <a href="#">market gateway</a> slides)</li> <li>◆ <b>Use</b> standard or supported bespoke messages (Inc. A4A)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Onboarding			✓
Impact on standard messages (if any)	<ul style="list-style-type: none"> <li>◆ Ensure your IT team/service provider has compared the structure, format and content of existing standard/supported messages against the Blueprint Two technical specifications.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure your messaging matches those specifications.</li> </ul>	Ongoing			✓
	<ul style="list-style-type: none"> <li>— Based on the comparison to published specifications, complete an assessment of any changes required to the structure, format or content of your existing messages (along with any internal changes needed).</li> <li>— Look out for updates on any minor variances to the published messages that may occur as the build continues; take action to ensure any changes can be accommodated. Any variations will be published.</li> </ul>	<ul style="list-style-type: none"> <li>— This impact assessment will provide a basis for adapting 'as is' processes that interact with/rely on messaging.</li> <li>— This will ensure that you continue to work with the latest version of all messages. See <a href="#">website</a> for further details.</li> </ul>	Ongoing		✓	✓

◆ Update made since v2

# Messaging adoption activities (2/4)

Assess the impact on customised messages (if any)

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Impact on customised messages (if you have any)	— Establish if you currently use customised/transformed messages. Your engagement partner will be able to help you determine if you have customised messaging.	— This will inform whether you need to act in respect of customised/transformed messages.	Ongoing		✓	✓
	◆ Validate the list of messages supplied by Velonetic confirming which 'standard' and 'customised' messages you receive today, and which ones will be supported/unsupported going forward.	— This will determine which customised messages may require reverting to standard/supported equivalents. Complete the <a href="#">change plan</a> .	Ongoing		✓	✓
	◆ If applicable, having established which of your customised messages will be supported by Velonetic (certain widely-used customisations) and which will no longer be supported (e.g. bespoke renames or conversions) consider whether there are messages that are no longer needed. <a href="#">See website</a>	— This will shape your approach for customised/transformed EDI messages and feed into your <a href="#">change plan</a> .	Ongoing		✓	✓
	— Decide which, if any, customisations you wish to retain based on those being supported; and agree on where you will need to revert to standard or supported versions.	— This will provide insights into the resources and costs associated with transitioning from customised messaging. It will also assess the feasibility of retaining custom messages and associated costs (following publication by Velonetic).	Ongoing		✓	✓
	— For the customised messages that will not be supported, work with your IT team/service provider to compare the content of the standard/ supported messages against your customised messages, to identify any data gaps.	— This detailed gap analysis will help establish the scale and cost of the change for your business.	Ongoing		✓	✓
	— Establish the cost and resources required to revert to the standard / supported versions; or to implement any workaround processes needed in the interim.	— This will enable effective planning and budgeting to be able to move away from customised messaging ahead of phase one go live.	Ongoing	✓	✓	✓
ACORD4ALL sunset considerations	<p>◆ A4A will be sunset</p> <ul style="list-style-type: none"> <li>— Consider your approach:                             <ul style="list-style-type: none"> <li>— If you are currently using an unsupported EDI messages, you are encouraged to adopt either supported bespoke or standard message types for phase one.                                     <ul style="list-style-type: none"> <li>— We would discourage adopting A4ALL, as this would be transitional only and only provide a short-term solution.</li> </ul> </li> <li>— If you are currently using A4ALL be prepared that you will need to move away from this message type, this will be possible from the launch of phase 2 capabilities. You would be encouraged at that point to consider a move towards ACORD messaging, to avoid regressing back to EDI.</li> </ul> </li> </ul>	— This will ensure that you make a well-informed decision regarding the suitability of the solution for your business.	Ongoing			✓

# Messaging adoption activities (3/4)




Assess the impact on customised messages (if any)

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Impact on messages changes	<p>There are some changes to sequence numbers and signing numbers and dates. Market firms must understand that:</p> <ul style="list-style-type: none"> <li>Formats for all <b>Signing Numbers and Dates</b> (SND) will be retained. However, internal ranges will not be retained for Lloyd's. See the <a href="#">website</a> for more information.                             <ul style="list-style-type: none"> <li>Review your business processing, and understand what impact this may have, particularly if you rely on signing number and dates for routing or validation.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>This detailed analysis will help establish the scale and cost of the change for your business.</li> <li>This will ensure that you fully understand the impacts of the changes</li> <li>A change impact assessment should be completed (<a href="#">template available if required</a>). This impact assessment will provide a basis for adopting 'to be' processes that interact with/rely on the portal notifications. This activity will help define your 'to be' processes.</li> </ul>	Ongoing		✓	✓
	<ul style="list-style-type: none"> <li>For EDI messages, <b>sequence numbers</b> will not be continuous between the mainframe and the digital platform. However, they will not be reset to zero. See the <a href="#">website</a> for more information.</li> <li>Prior to cutover a future starting number will be identified, and all EDI messages produced from the platform will originate from that number going forward. This avoids in-year duplication.                             <ul style="list-style-type: none"> <li>Speak to IT team/service provider to accommodate this change and understand any downstream impacts of this change.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>This will ensure that message interaction can continue with the new digital services.</li> </ul>	Ongoing		✓	✓
Identify impacted users	<ul style="list-style-type: none"> <li>Identify and document any individuals who currently interact with/rely on messaging from the Velonetic.</li> </ul>	<ul style="list-style-type: none"> <li>This 'messaging stakeholder' list will ensure a full understanding of who will be impacted.</li> <li>A stakeholder analysis should be completed (<a href="#">templated available if required</a>).</li> <li>This user list will inform adoption activities such as creation of login credentials and identification of training needs.</li> </ul>	Ongoing	✓		
	<ul style="list-style-type: none"> <li>Assess any associated roles and responsibility changes on new updated processes.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure that your organisation is operationally ready for phase one.</li> </ul>	Ongoing	✓		



# Messaging adoption activities (4/4)

Identify the updates to technology and the changes to the file collection locations

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Identify impacted processes	— Identify and document current processes that interact with and/or support existing messages ( <i>such as IPCCSM, IPCDSM/USM</i> ).	— These ‘as is’ processes will provide a basis for assessing the impact of the change and inform any testing that may be required.	Ongoing		✓	
Defining future processes	— Having established what changes there are to messaging, document the changes required to the existing processes in your impact assessment tool and change plan.	— These will be the ‘to be’ processes to be adopted in readiness for phase one go-live. — A change impact assessment should be completed ( <i>template available if required</i> ).	Ongoing		✓	
Updates to technology	◆ Establish the impact of any message changes on existing automated process/robotics technology and document any changes in your change plan. For example, where messaging flows straight through into your systems, will a change in data interrupt that flow? Will changes to Signing Number and Date (SND) impact auto routing?	— This will help ensure that there is no interruption to existing messaging processes after phase one go live.	Ongoing			✓
	— In the case that you need to make changes to your technology based on message data changes, obtain sign-off for the approach and work with your IT team/service provider to make the required updates.	— This will ensure that message interaction can continue with the new digital services.	Ongoing			✓
Changes to the file collection locations	<ul style="list-style-type: none"> <li>— Identify the data files that you receive from Velonetic (e.g. EDI messages) and how and where they are collected. This will usually be an SFTP site.                             <ul style="list-style-type: none"> <li>○ In the case of manual data collection, work with your team to update the new file collection locations once confirmed by the Velonetic.</li> <li>○ In the case of automated collection, work with your IT team/service provider to ensure changes are made to support ongoing auto collection from the new SFTP location.</li> </ul> </li> <li>◆ If you receive you EDI via email today you will need to find an alternative, likely to be SFTP.                             <ul style="list-style-type: none"> <li>○ If you currently receive your files in CSV format, then standard EDIs will be converted to .EDI files and A4All will be XML</li> </ul> </li> </ul>	— This will ensure that data file collection can continue.	Testing		✓	✓

# Delegated Authority adoption activities (1/2)

Understand that DA will follow the same journey as open market with minimal changes



## Summary of the change

- INFO - Brokers will continue to **submit binders, LPAN FDOs and associated premium bordereaux** as they do today but via the **Document Repository Service (DRS)** (replacing the IMR) (see [Document Repository Service \(DRS\) slides](#))
- Carriers can continue **view documents** via the DRS portal.
- Market firms will continue to receive messages as they do today, but all messages will go to and from the market gateway (ASG Adept), **replacing the current XAG/XDH/XFG gateways.**
- Certain message customisations will no longer be supported. If your messages fall into this category, carriers are encouraged to **move away from unsupported bespoke messages.** ([refer to the messaging section of this guide for more details](#)).
- All market firms will need to use ICOS to respond to Velonetic queries. Premium queries are dealt with via the broker (refer to the [query management](#) slides).



## Additional information

- INFO - Brokers can now submit a **risk bordereaux** into the new Document Repository Service (DRS) (replacing the IMR) which carriers can view via DRS (see [DRS document slides](#)). These will be stored but no data will be extracted.
- The new digital services are being introduced to help process premium accounting and settlement and claims workflow and settlement.
- Phase one is designed to ensure there is minimal change. DA will follow the same journey as open market. Please read the guide thoroughly to grasp the full benefits, impacts and mandatory activities.
- Effective from cutover, existing portals and applications will no longer be accessible. Market firms should ensure they thoroughly understand any additional portals or applications they currently utilise, which may soon become unavailable. They need to assess the functionalities their current portals offer and understand how this will be replaced.
- While phase one is aimed at causing minimal impact to the market, there is an ongoing strategic review of DA looking at the full end-to-end journey and how processes can be improved, and efficiencies gained.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	— All market firms will need to make technology changes and connect to the market gateway (ASG Adept) to be able to send and receive messages ( <a href="#">refer to the market gateway section</a> ).	— Ensuring your full awareness of mandatory requirements will enable strategic considerations.	Onboarding			✓
	— All market firms must review their messages in accordance with the <a href="#">messaging section</a> of the guide, as some customisations will no longer be supported.	— Ensure that you are technically ready to adopt phase one digital services	Testing			✓
	— All market firms must be able to access ICOS in phase one to be able to manage queries (refer to accessing <a href="#">IPOS/ICOS</a> slides and see <a href="#">query management</a> slides).	— Ensure that you are technically ready to adopt phase one digital services.	Onboarding			✓
	— All market firms can continue to upload and view documents via DRS as they do today in the IMR but must access DRS (refer to <a href="#">DRS slides</a> for accessing details) to do so.	— This will ensure that you can continue to upload and view documents in via DRS	Onboarding			✓

# Delegated Authority adoption activities (2/2)

Understand your channel options

Topic	Activity	Target outcome	Target phase
			<div style="display: flex; justify-content: space-between;"> <div style="background-color: #e0e0e0; padding: 2px;">People</div> <div style="background-color: #f00; padding: 2px;">Process</div> <div style="background-color: #0070c0; padding: 2px;">Tech</div> </div>
Consider your channel adoption approach	<p>Phase one is being delivered in a way which will cause minimal impact to the market and hence, it is anticipated that market firms <b>will continue to use the same channels</b> as they do today, making only the mandatory changes discussed in this guide. However, firms should be aware of their channel options.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Using IPOS for <a href="#">account enquiry</a></li> <li><input type="checkbox"/> Using ICOS for <a href="#">queries only</a></li> <li><input type="checkbox"/> Using ICOS for some functionality (see <a href="#">using ICOS</a>)</li> <li><input type="checkbox"/> Using ICOS for all functionality</li> <li><input type="checkbox"/> Using Writeback</li> <li><input type="checkbox"/> Using CWT</li> <li><input type="checkbox"/> Any combination of the above</li> <li><input type="checkbox"/> Choose how you will view and upload documents. There will be the ability to upload directly into the <a href="#">DRS portal</a> (IMR) via the ICOS portal.</li> </ul> <p><b>NB</b> Carriers can switch between using Writeback and ICOS part way through the claim's lifecycle, however data consistency and message sequencing may be disrupted if you wanted to revert to Writeback.</p> <p><b>NB</b> If you change your operating channels, consider the implications of your decisions on your target operating model and your people.</p> <p><b>NB:</b> A single sign on (SSO) is available for all DPS services including, IPOS/ICOS/ DRS and Qlik sense.</p>	<ul style="list-style-type: none"> <li>— The guide will assist in shaping your channel adoption strategy by providing insights into the advantages, drawbacks, and potential inhibitors associated with your adoption approach.</li> <li>— This analysis will ensure that you are operationally ready to adopt phase one.</li> </ul>	Ongoing <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 10px;"> <span style="color: green; font-size: 2em;">✓</span> <span style="color: green; font-size: 2em;">✓</span> </div>

# Proportional Treaty adoption activities (1/1)

Understand that Proportional Treaty will have minimal change



## Summary of the change

- INFO- Brokers will continue to **submit their FDOs and treaty statements** as they do today either via the **Document Repository Service (DRS)** (IMR) (see [Document Repository Service \(DRS\)](#) slides) or via DRI.
- Carriers will be able to **view submissions** via the DRS portal as they do today in the IMR.
- A new cloud-based application for proportional treaty processing will be introduced, **managed internally** by Velonetic.
- Market participants will **not require additional training** for this transition.
- Market firms will continue to receive messages as they do today, but all messages will now route through the market gateway (ASG Adept) **replacing the XAG/XDH/XFG gateways**.
- Certain message **customisations will no longer** be supported going forward. ([refer to the messaging section of this guide for more details](#)).



## Additional information

- Please read the guide thoroughly to grasp the full benefits, impacts and mandatory activities.
- The Proportional Treaty application is a **separate application to IPOS and ICOS** and will only support the processing of PT contract, premium and claims statements.
- Proportional Treaty phase one aims to minimise disruptions by utilising the digital supporting services used for open market hence **aligning proportional treaty processing**.
- The **query process** will continue as it is today, with no change.
- Effective from cutover, existing portals and applications will no longer be accessible.
- While this phase one is aimed at minimal impact to the market, there is an **ongoing strategic review of Proportional Treaty** looking at the full end-to-end journeys.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	— All market firms will need to make technology changes and connect to the market gateway (ASG Adept) to be able to send and receive messages ( <a href="#">refer to the market gateway section</a> ).	— Ensuring your full awareness of mandatory requirements will enable strategic considerations.	Onboarding			✓
	— All market firms must review their messages in accordance with the <a href="#">messaging section</a> of the guide, as some customisations will no longer be supported.	— Ensure that you are technically ready to adopt phase one digital services.	Testing			✓
	— All market firms can continue to view and/ or upload documents as they do today in the IMR but will need to access the new Document Repository Service (DRS) (see <a href="#">Document Repository Service (DRS)</a> slides) to do so.	— This will ensure you can continue to use the facility as you do today and can continue to upload and view documents in the DRS.	Onboarding			✓
Proportional Treaty Application	— This is internal only; the market has no direct access, therefore there are no actions for the market to take in terms of training, but market firms may want to be aware of the general functionality.	— Familiarise with any new processes	Ongoing	✓	✓	



# Digital services adoption activities: Accessing IPOS & ICOS (1/2)

Ensure required access to the IPOS & ICOS and adhere to the mandatory changes



## Summary of the change

- Market firms must access the new digital processing services, **replacing existing** portals/ applications which will not be available from cutover.
- The current functionality contained in the existing portals/applications (such as LIDS, CLASS (Claims Loss and Advice Settlement System) and ECF (Electronic Claim File)), will be **replaced by the new digital services** (via IPOS/ICOS).
- It is essential for all market firms to access ICOS **to manage queries** raised by Velonetic.
- There will be a **single sign on** alongside the other new portals, meaning you can access all the new services from one place (including Qlik sense, LORS, Knowledge Base and DRS).
- All market firms will require **market gateway (ASG Adept)** connectivity to ensure ongoing sending and receiving of messages (see [messaging](#) slides)
- **Management of user access** will move to the market firms, providing a faster more efficient way of onboarding/offboarding





## Additional information

- New digital services are being introduced to help process premium accounting and settlement and claims workflow and settlement respectively.
- Velonetic technicians will process and settle transactions using the new digital processing services.
- Ahead of testing you, or your service provider, will be provided with a **new URL for the landing page for the DPS portal**, along with a username, password and any other credentials necessary.
- Demos of the new ICOS portal screens are already available. User manuals/training materials are also **available on the learning platform**.
- Market firms should ensure they thoroughly understand any additional portals or applications they currently utilise, which may soon become unavailable. They need to assess the functionalities their current portals offer and understand how this will be replaced.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	— All market firms must access ICOS to manage queries raised by Velonetic. Firms must ensure that they have full access via DRS. (see <a href="#">query management</a> slides).	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Onboarding			✓
Log in credentials and security specifications	— Obtain the URL once available from Velonetic and ensure this is whitelisted.	— This is to ensure you have the location of the application so that you can access the landing page and add in your credentials.	Onboarding			✓
	<ul style="list-style-type: none"> <li>— Review your own security specifications and set-up authentication. Work alongside your IT team and/or service provider to ensure that users can access the portals (i.e. is the supported browser installed, e.g. Chrome etc.)</li> <li>— Information regarding authenticator apps is available in the <a href="#">onboarding guide</a>.</li> <li>— Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one adoption.</li> <li>— Ability to use a Multi-factor Authentication (MFA) app to login.</li> </ul>	— This will ensure the environment is compliant with your internal security requirements and your users can validate their access.	Onboarding		✓	

# Digital services adoption activities: Accessing IPOS & ICOS (2/2)

Ensure you can manage your users and consider IT impacts

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
User management	<p>All market firms will need to manage onboarding and offboarding their users. Velonetic will no longer manage this; there will be no 'tickets' to raise. Actions will be immediate and within market firms' own control.</p> <ul style="list-style-type: none"> <li>Identify the internal business processes and map your 'as is' processes and then map your 'to be' processes.</li> </ul>	<ul style="list-style-type: none"> <li>A change impact assessment should be completed (<a href="#">template available if required</a>). This impact assessment will provide a basis for adopting 'to be' processes</li> </ul>	Onboarding	✓	✓	✓
	<ul style="list-style-type: none"> <li>Nominate your business as usual "administrators" (if different to programme onboarding admins) who will create new users, secure log in credentials and manage future joiners/leavers for DPS</li> <li>All users will need to be set up for go live; after that time, it is management only</li> </ul> <p><b>NB</b> This is relevant for all portals. <a href="#">See onboarding guide</a>.</p>	<ul style="list-style-type: none"> <li>Ensure the user admins are set up post-go live, to manage the environment in a more flexible, proactive, nimble way.</li> <li>This will prevent time delays and ensure a fast, effective process for the future.</li> </ul>				
Impact on existing IT processes and internal IT systems	<ul style="list-style-type: none"> <li>Establish if your internal systems interact with any of the portals/applications that will no longer be available. Document these changes and identify who is going to be responsible for making the changes (e.g. IT team, service provider, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>This will prepare your IT team/service providers to make any IT process changes and ensure data can continue to flow and feed existing processes.</li> </ul>	Ongoing			✓
	<ul style="list-style-type: none"> <li>In the case that you need to make updates to your current technology/internal systems, obtain sign-off for the changes required and seek internal approval for the cost of making the changes.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure sufficient budget and resources will be made available to meet any development costs.</li> </ul>	Ongoing			✓
	<ul style="list-style-type: none"> <li>Inform your IT team/service provider of any changes required to internal systems to update the interaction with the new portals/applications; and keep track of progress.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure that interaction can continue with the new portals.</li> </ul>	Ongoing			✓

# Digital services adoption activities: Using ICOS and IPOS (1/8)

Understand the phase one ICOS & IPOS capabilities, and where to access them








## Summary of the change

- All market firms will **need to** use ICOS to respond to Velonetic queries. This is a mandated change (see [query management](#) slides).
- Carriers can **choose to raise queries** to the brokers in the portal (in conjunction with Writeback, if applicable)
- Existing portals/applications (e.g. CLASS and ECF) will **not be available** from cutover. Their functionality will be replaced by ICOS and IPOS.
- Market firms **have choices** as to how they use IPOS/ICOS:
  - Use ICOS to manage **queries** only
  - Use IPOS for **account enquiry**
  - Choose to use ICOS for **some functionality**, alongside their own systems
  - Check the **workflow status in ICOS**. CWS is no longer available
- Adoption of the portal will **provide notifications of change in status (ICOS)**.
- There will be a **data migration** of premium and claims historic data. This will be copied to the data lake in the DPS. Data that is reclassified will be loaded into the DPS data warehouse and will be used for processing, Reach-Back and reporting.
- Market firms will still require market gateway (ASG Adept) **connectivity** to ensure ongoing receipt of messages (see [messaging](#) slides).
- Market firms can also access the new Knowledge Base portal via the single sign on.






## Additional information

- Phase one is being delivered in a way which will cause minimal impact to the market, and hence it is anticipated that **market firms will continue to use the same channels** as they do today, making only the mandatory changes that will be discussed in this guide.
- Be aware that all phase one EDI messaging will have a **planned sunset date** (see [messaging](#) slides).
- **Writeback** is still available to raise queries to brokers.
- **Parallel UCRs** will continue to be available.
- All portal users should proactively utilise the training materials, to review the content within the portal screens to ensure that they are able to record and receive the same information as today.
- For carriers, access to IPOS is restricted to viewing premiums (via account enquiry) ( all markets)
- Access is available 24/7, with no downtime for 'overnight runs.
- **Volume claim service** will no longer be available.
- As a carrier ICOS portal user, you will gain access to enhanced functionality gradually introduced in phases. This functionality will include features such as creating a new payee and administering settlements.
- Market firms should ensure they thoroughly understand any additional portals or applications they currently utilise, which may soon become unavailable. They need to assess the functionalities their current portals offer and understand how this will be replaced.

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Mandatory changes	All market firms must <ul style="list-style-type: none"> <li><input type="checkbox"/> Access ICOS to manage Velonetic queries. Firms must ensure that they have full access via DPS. (refer to accessing <a href="#">IPOS and ICOS</a> slides and see <a href="#">query management</a> slides).</li> <li><input type="checkbox"/> Make technology changes and connect to the market gateway (ASG Adept) to be able to send and receive messages (<a href="#">refer to the market gateway section</a>)</li> </ul>	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services</li> </ul>	Onboarding			
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review their messages in accordance with the <a href="#">messaging section</a> of the guide, as some customisations will no longer be supported.</li> </ul>	<ul style="list-style-type: none"> <li>— . Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Testing			

# Digital services adoption activities: Using ICOS and IPOS (2/8)

Understand the phase one capability and review options

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Using phase one capability	<p>— In phase one, all firms must be able to interact with the portals. Ensure you have a thorough understanding of the reasons behind their usage and where to access them, ensuring you can tick off the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Able to access to the portal (refer to <a href="#">accessing the portals</a> slides).</li> <li><input type="checkbox"/> Understand how/ where the current functionality contained in the <a href="#">existing portals</a> (e.g. POSH,LIDS, CLASS, ECF, etc.) will be replaced by the new portals.</li> <li><input type="checkbox"/> Able to use the ICOS portals to respond to a query raised by Velonetic or to raise a query to the broker. (refer to the <a href="#">portals for query management</a> slides).</li> <li><input type="checkbox"/> Use the IPOS portal for account enquiry.</li> <li><input type="checkbox"/> Decided on your strategy on the use of ICOS (whether to continue with messaging EDIs short term/ACORD longer term) and/or adopting ICOS as your claims platform)</li> <li><input type="checkbox"/> Take advantage of any additional portal functionality (when available) e.g. creating a new payee (see later).</li> <li><input type="checkbox"/> Able to access the knowledge Base via single sign on.</li> </ul>	<p>— Ensuring your full awareness of mandatory requirements will enable strategic consideration of early phase two digital capabilities.</p> <p>— Understanding the phase one capabilities that may influence your phase two adoption path is important, as it enables due consideration to be given to the ease of transitioning between portal and ACORD messaging or EDI to ACORD in phase two.</p>	Ongoing		✓	✓
Consider your channel adoption approach	<p>Phase one is being delivered in a way which will cause minimal impact to the market, and hence it is anticipated that market firms <b>will continue to use the same channels</b> as they do today, making only the mandatory changes discussed in this guide. However, firms should be aware of their channel options:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Using IPOS for account enquiry</li> <li><input type="checkbox"/> Using ICOS for <a href="#">queries</a> only</li> <li><input type="checkbox"/> Using ICOS for some functionality</li> <li><input type="checkbox"/> Using ICOS for all functionality</li> <li><input type="checkbox"/> Using Writeback</li> <li><input type="checkbox"/> Using CWT</li> <li><input type="checkbox"/> Any combination of the above</li> <li><input type="checkbox"/> Choose how you will view and upload documents. There will be the ability to upload directly into the <a href="#">DRS</a> portal (IMR) via the ICOS portal.</li> </ul> <p>NB Carriers can switch between using Writeback and ICOS portal part way through the claim's lifecycle, however data consistency and message sequencing may be disrupted if you wanted to revert to Writeback.</p> <p>NB If you change your operating channels, consider the implications of your decisions on your target operating model and your people.</p>	<p>— The guide will assist in shaping your channel adoption strategy by providing insights into the advantages, drawbacks, and potential inhibitors associated with your adoption approach.</p>	Ongoing		✓	✓



# Digital services adoption activities: Using ICOS and IPOS (3/8)

Decide on your adoption strategy and understand any impacts



Topic	Activity	Target outcome	Target phase	People	Process	Tech
Parallel UCR's	<ul style="list-style-type: none"> <li>Parallel UCR's will continue to exist as they do today</li> <li>Where market firms have interactions with third parties for parallel UCRs or you have business functions such as service companies, run-off / RITC arrangements, you are encouraged to share the broker and carrier adoption guides with those stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure third parties are also aware of any system and process considerations they will need to take when the new solution goes live</li> </ul>	Ongoing		✓	✓
Make a strategic decision to adopt ICOS as your primary system	<p>The introduction of ICOS gives all market firms the ability to utilise the new functionality. Firms are advised to plan by undertaking the following:</p> <ul style="list-style-type: none"> <li>Consider whether the ICOS platform satisfies your claims needs, and whether it could serve as your primary platform, eliminating the necessity for your own technical solution for claims.</li> <li>Consider the implications of transitioning to a portal-only solution, not only for phase one but also for the long-term implications it may have on any potential phase two adoption pathway.</li> </ul>	<ul style="list-style-type: none"> <li>This guarantees clarity on your adoption plan and full awareness of long-term impacts of your decision.</li> <li>The new platforms enable broader considerations and review of wider technology opportunities, which should be factored into your adoption roadmap.</li> <li>It also helps understand how your chosen phase one approach may impact the phase two adoption plan and the ease in which you could transition between (e.g.) portal to ACORD messaging or EDI to ACORD in phase two</li> </ul>	Ongoing		✓	✓
Target Operating Model impacts for claims	<ul style="list-style-type: none"> <li>Using the 'as is' and 'to be' process maps that you will create (or have already created) in preparation for phase one adoption, and beyond, consider whether your current/interim/future business would benefit from a revised Target Operating Model as a result of the new options that you will have available for claims processing.</li> <li>Ensure alignment with your overall roadmap and strategy for achieving full digitalisation, ensuring decisions made now do not hinder phase two adoption.</li> </ul>	<ul style="list-style-type: none"> <li>Understand the benefits that could be unlocked through the implementation of a new target operating model, along with the longer-term downstream impacts for phase two adoption.</li> </ul>	Ongoing	✓	✓	✓




# Digital services adoption activities: Using ICOS and IPOS (4/8)

Understand the impact of using portal-only notifications

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Impact of notifications on existing business processes in ICOS	<ul style="list-style-type: none"> <li>— Understand that as an ICOS user you will receive notifications of status changes: Consider how you could use/manage notifications.                             <ul style="list-style-type: none"> <li>— You can log into the portal to check the status and progress of submissions</li> <li>— You may need to manually update your own systems (if appropriate), which may necessitate double-keying as you do today.</li> <li>— If you are not a regular user, consider how you will action portal notifications.</li> </ul> </li> <li>— Feed the above into your change plan and establish the cost and resources required to obtain any additional information equivalents for phase one.</li> </ul> <p><b>NB</b> There are no notifications in IPOS in phase one, as per existing state.</p> <p><b>NB</b> Using ICOS will not impact on markets firm's ability to use Writeback.</p>	<ul style="list-style-type: none"> <li>— This detailed analysis will help establish the scale and cost of the change for your business.</li> <li>— This will ensure that you fully understand the impacts of using the portals.</li> <li>— A change impact assessment should be completed (<a href="#">template available if required</a>). This impact assessment will provide a basis for adopting 'to be' processes that interact with/rely on the portal notifications. This activity will help define your 'to be' processes.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>— Explore the opportunities presented by the enhanced portal capability, allowing multiple users to collaborate on processes and actions. Evaluate the feasibility of establishing a central team to handle queries (e.g. Operations).</li> </ul>	<ul style="list-style-type: none"> <li>— This will allow you to assess the potential for process optimisation and adjustments to your operating model, to streamline processes and improve efficiency.</li> </ul>	Ongoing		✓	
Identify impacted users	<ul style="list-style-type: none"> <li>— Using your stakeholder list, review and update any individuals who will be interacting with the portals. From this, compile a user list detailing individuals who will require access to the portals; including:                             <ul style="list-style-type: none"> <li>— Those responsible for raising and responding to queries, (ICOS) (see <a href="#">query management</a> slides).</li> <li>— Those currently dependent on incoming data or messages.</li> <li>— Those who may transition to utilising the portals in the future.</li> <li>— Those who will be inputting into the portals in the future.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>— This updated 'stakeholder' list will ensure a full understanding of who will be impacted, so they can be prepared for the change. A stakeholder analysis should be updated (<a href="#">templated available if required</a>).</li> <li>— This user list will inform adoption activities such as creation of login credentials and identification of training needs, ensuring that your firm is operationally ready for phase one.</li> </ul>	Ongoing	✓		

# Digital services adoption activities: Using ICOS and IPOS (5/8)

Understand the impact of using the portals and define your future business processes

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Impact on existing processes	<ul style="list-style-type: none"> <li>Identify the internal business processes and map your 'as is' processes.</li> <li>Review ancillary processes to ensure that you are aware of impacts downstream.</li> </ul>	<ul style="list-style-type: none"> <li>These 'as is' processes will provide a basis for assessing the impact of the change to business process and inform any scenario testing that may be required.</li> </ul>	Ongoing		✓	
Define future processes	<ul style="list-style-type: none"> <li>Once you have identified the changes necessary for using ICOS/IPOS and understood how they affect your business processes, map out your future processes and document the resulting impacts using the provided change impact assessment tool and change plan templates.</li> </ul>	<ul style="list-style-type: none"> <li>Defining your future processes will ensure that the impact of the changes are clear for the end-to-end processes (including notifications and business changes).</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>Review ancillary processes to facilitate near-real-time payment processing, which could enhance internal processing speed but may necessitate adjustments within departments such as operations, finance, and reporting.</li> </ul>	<ul style="list-style-type: none"> <li>It will further ensure that full benefits are realised, and opportunities are created in downstream/ancillary processes.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>Document the ICOS /IPOS process and any modifications to existing portal processes and develop or revise user manuals accordingly. These updates can be documented using the change impact assessment tool and should be integrated into your change plan.</li> </ul>	<ul style="list-style-type: none"> <li>A change impact assessment should be completed (<a href="#">template available if required</a>).</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>Evaluate any changes to your target operating model and associated roles and responsibilities in light of the newly updated processes.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure that your organisation is operationally ready for phase one.</li> </ul>	Ongoing		✓	
Impact on existing IT processes and internal IT systems	<ul style="list-style-type: none"> <li>Analyse and document any IT systems changes required. Capture changes in your change plan.</li> <li>In the case that you need to make updates to your internal systems, work with your IT team/service provider to update the interaction to the new screens.</li> </ul>	<ul style="list-style-type: none"> <li>This will enable you to track any IT changes required ahead of phase one adoption and will ensure that any interaction can continue with the new screens.</li> <li>A change plan template should be completed (<a href="#">template available if required</a>).</li> </ul>	Ongoing			✓

# Digital services adoption activities: Using ICOS and IPOS (6/8)

Understand the changes to any data and IT solutions that you currently rely on today

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Make technology updates	— Conduct an impact assessment of broader system changes, including adjustments required to access, process, and respond to digital messaging, as well as changes to updated business processes. For instance, consider utilising portal notifications in real-time rather than waiting for overnight batched messages.	— This impact assessment will allow more effective real-time interaction and processing once phase one digital services go live.	Ongoing		✓	✓
	— Work with your IT team/service provider to implement the necessary integrations in your wider systems required for updated portal processes (e.g. claims, Policy Administration System, finance systems, reporting suites). — Make any required updates to your portal-based automation process/robotics technology.	— This will ensure wider interaction with the new portal digital services.	Ongoing			✓
	— Consider the end-to-end impacts on digital upgrades, including the complexity of combining strategies when it comes to phase two adoption (e.g. ACORD EBOT messaging for premiums and IPOS portal for premiums).	— This analysis will ensure you are aware of wider impacts for phase two digital services.	Ongoing			✓
	— Review and evaluate IT change impacts on your internal IT architecture.	— This ensures your internal IT architecture is updated in line with the requirements for the new digital services.	Ongoing			✓
Changes to data received	— Assess the implications of any information data changes on existing automated process/robotics technology and document any changes in your change plan. For instance, consider whether modifications to messaging could disrupt the seamless flow of data into your systems. — Collaborate with your IT team or service provider to implement the required updates.	— This will ensure that data file collection can continue.	Ongoing			✓
	— Analyse your data standards (including any gaps) and review your ongoing need for any additional data you may currently collect or receive. — Compare the data you provide and receive today ( e.g. ECF+EDI) and ensure that you can secure the same data post go-live. — Feed the above into your change plan and establish the cost and resources required to obtain any additional information equivalents for phase one. — Design your end-to-end data model, analysing your data standards, and identifying any existing gaps. Additionally, assess the ongoing need for any additional data that you currently collect or receive.	— This will provide clarity on any data gaps. — This will help ensure that there is no interruption to data flow processes after you adopt phase one. — This detailed analysis will help establish the scale and cost of the change for your business.	Ongoing			✓



# Digital services adoption activities: Using ICOS and IPOS (7/8)

Educate and train users on the benefits of additional ICOS and IPOS functionality

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Internal user training	Velonetic will continue to demonstrate the IPOS/ ICOS screens, and you will have access to training materials. — Make sure you have access to the Velonetic Education learning platform and signed up for any required instructor-led training sessions (see <a href="#">training</a> page on Velonetic website).	— This will enable you to get a fuller understanding of the IPOS/ICOS solutions, and how this will work in practice.	Training	✓		
	— Document the portal changes against the existing processes and update any user manuals. — <b>Note:</b> Ensure you obtain the Velonetic user manuals as a training aid (available on the learning platform).	— This activity will help define your 'to be' processes. — A change impact assessment should be completed ( <a href="#">template available if required</a> ).	Training	✓	✓	
	— Upskill users who will be using the new screens by ensuring they have access to the training materials available.	— This will ensure users are able capable of using the new portals in phase one.	Training	✓		
Educate on benefits and functionality	— Consider the additional benefits and functionality provided through using IPOS and ICOS (e.g.) <ul style="list-style-type: none"> <li>— Ability to log into IPOS to view premium (via account enquiry)</li> <li>— Ability to log into the ICOS portal to view the status and progress of submissions (which you can update in your own systems)</li> <li>— Ability for all agreement parties to agree claims (ICOS)</li> <li>— Ability for lead carriers to add agreement parties to claims (ICOS)</li> </ul> <b>Note:</b> Additional functionality may be available at different phases.	— Familiarise yourselves with the additional benefits from utilising the portals, to help inform longer term strategy	Ongoing		✓	✓

# Digital services adoption activities: Using ICOS and IPOS (8/8)

Consider the use of funded settlement

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Market firms will have the option to use Vitesse funded settlement services	<ul style="list-style-type: none"> <li>— Agree with the relevant stakeholders (e.g. finance team) in your organisation whether you want to use Vitesse funded settlement.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure all stakeholders are aligned on whether Vitesse direct settlement will be adopted.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>— If you have been onboarded by Vitesse and have a funded account set up, then you can use this facility via ICOS.</li> <li>— With a funded account, carriers pay in an agreed fund from which payments are taken. Payments are made automatically, and notifications are sent if the fund is running low as per pre-defined limits.</li> <li>— To utilise this facility:                             <ul style="list-style-type: none"> <li>— You will have to log into ICOS and select this payment option to allow the process</li> <li>— This will be for singleton claims only</li> <li>— If you are already signed up for Faster Claims Payment (FCP), (and have been onboarded separately, as above) you will still need to select this option for payment</li> <li>— This will be for open market claims only</li> </ul> </li> </ul> <p><b>NB</b> This is to be tested as a proof of concept initially, to either proves its value or improve its value.</p>	<ul style="list-style-type: none"> <li>— This will allow you to use Vitesse if desired, unlocking the capability to make payments in hours rather than days.</li> </ul>	Ongoing		✓	

# Digital services adoption activities: ICOS for query management (1/3)

Understand the process of managing queries in the portal



## Summary of the change

- All carriers **must utilise ICOS to respond to Velonetic queries**. Email queries will no longer be used by Velonetic.
- Carriers **can raise queries** to the broker via
  - ICOS or
  - Writeback
- Using the portal ensures enhanced transparency and provides a clear audit trail of all conversations.
- **Interactive querying** in the portal facilitates swift resolution, while allowing all involved parties to access relevant discussions (unless marked confidential).
- **Premium queries** raised by **Velonetic technicians will be directed to brokers** to resolve, including carrier consultation if necessary, meaning Velonetic queries will not be raised to the carrier via the IPOS portal.
- Firms using their own systems should anticipate some level of **double-keying** to reflect conversations within their systems.






## Additional information

- Generally, Velonetic can raise queries in the IPOS & ICOS portals. Carriers can raise queries in the ICOS portal. All parties can respond. Brokers cannot raise queries.
- While there will be a portal notification of a query, firms can also opt in to receive an **email notification advising there is a query**.
- Firms are advised to **plan regarding the receipt of query emails via the ICOS portal**. They should establish a centralised mailbox before cutover, if opted in.
- Once you have accessed the portals, firms gain the additional capability to **track transaction statuses** at any point in the process.
- Market firms should ensure they thoroughly understand how to access and use IPOS/ICOS. Please refer to previous slides in the section to understand the functionalities and requirements.
- The query management for **Proportional Treaty will remain as it is today, via email**
- **Scheme Canada** queries will go through the Lloyd's team as they do today.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	All market firms must access ICOS to respond to queries from Velonetic. Firms must ensure that they have full access (refer to <a href="#">accessing and using IPOS/ ICOS</a> slides)	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Onboarding			✓
Understand the process managing queries in the portal	<ul style="list-style-type: none"> <li>— Understand that as a portal user you will receive portal notifications in ICOS, indicating a change in status or a query has been raised by the Velonetic technician.</li> <li>— Firms can also opt in to receive email notifications, indicating that there is a query to be actioned.                             <ul style="list-style-type: none"> <li>— This is recommended, if you are not anticipating working in the portal constantly.</li> </ul> </li> <li>— These emails will usually be at organisational level. Firms are advised to plan regarding the receipt of query emails, by considering the following:                             <ul style="list-style-type: none"> <li>— how any internal email mailbox will be managed, and how to allocate emails/portal queries from a central mailbox.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>— The utilisation of a query management function is a new concept and differs from how the market operates today. By understanding the new process, you will be able to consider the impacts on people (including roles and responsibilities).</li> </ul>	Ongoing	✓	✓	✓

# Digital services adoption activities: ICOS for query management (2/3)




Decide how you will manage queries

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Responding to Velonetic queries	<ul style="list-style-type: none"> <li>— Carriers will not receive queries from Velonetic in relation to premium, these will go directly to the broker, to be resolved in the same way as they are today.</li> <li>— Carriers must respond to Velonetic claims queries in ICOS. Consider how you will manage these queries.                             <ul style="list-style-type: none"> <li>— You will need to log into the portal to view and respond</li> <li>— If you are not a regular user, consider how you will action portal responses ( if you do not opt for the email notification)</li> <li>— You may need to manually update your own systems (if appropriate), which may necessitate double-keying</li> </ul> </li> <li>— Feed the above into your change plan</li> </ul>	<ul style="list-style-type: none"> <li>— The utilisation of a query management function is a new concept and differs from how the market operates today. By understanding the new process, you will be able to consider the impacts on people (including roles and responsibilities).</li> </ul>	Ongoing	✓	✓	
Raising and Responding to queries in the ICOS portal	<ul style="list-style-type: none"> <li>— Carriers can choose to raise queries to the broker in ICOS. Consider how you will manage queries in the portal.                             <ul style="list-style-type: none"> <li>— You will need to log into the portal to raise / respond</li> <li>— If you are not a regular user, consider how you will action portal responses ( if you do not opt for the email notification)</li> </ul> </li> <li>— If the broker responds to the query via portal                             <ul style="list-style-type: none"> <li>— You may need to manually update your own systems (if appropriate), which may necessitate double-keying</li> </ul> </li> </ul> <p><b>NB</b> The existing process of broker rereleasing a transaction or the carrier agreeing a queried transaction will remain</p> <p><b>NB</b> This facility for the broker to respond using the portal is still under review and therefore not mandated</p>	<ul style="list-style-type: none"> <li>— A clear strategy to deal with queries</li> </ul>	Ongoing		✓	
Writeback options	<p>Carriers who use writeback today, are still able to use writeback post go live. There are no changes to the writeback process</p> <ul style="list-style-type: none"> <li>— Writeback can still be used to raise queries to the broker on a claims transaction. The query will go via ICOS and will be sent to the Broker via the portal. The broker can choose to respond via                             <ul style="list-style-type: none"> <li>— ICOS (see above)</li> <li>— Use the same methods as they do today (email/ call/ amend and rerelease the claims transaction)</li> </ul> </li> <li>— Decide how you will raise queries and feed the above into your change plan</li> </ul>	<ul style="list-style-type: none"> <li>— Understanding how the ICOS portal works alongside writeback</li> </ul>	Ongoing		✓	



# Digital services adoption activities: ICOS for query management (3/3)

*Understand and impact and explore new functionality*

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Impact on existing processes	<ul style="list-style-type: none"> <li>Identify the internal business processes and map your 'as is' processes.</li> <li>Review ancillary processes to ensure that you are aware of impacts downstream.</li> </ul>	<ul style="list-style-type: none"> <li>These 'as is' processes will provide a basis for assessing the impact of the change to business process and inform any scenario testing that may be required.</li> </ul>	Ongoing		✓	
Benefit from new functionality	<ul style="list-style-type: none"> <li>Leverage the enhanced capabilities of the new portal, which eliminates the need for email-based query management and frees firms from the constraints of dealing with queries on a one-to-one basis. Explore the possibility of centralising query handling by establishing a dedicated team (e.g. Operations) to streamline and optimise the process.</li> </ul>	<ul style="list-style-type: none"> <li>This will encourage you to optimise your processes and revise your operating model to make dealing with queries more efficient.</li> </ul>	Ongoing		✓	

# Digital services adoption activities: LORS for outward reinsurance submissions (1/3)

Working with minimal change in the new LORS portal






## Summary of the change

- Market firms will retain the ability to **input outwards reinsurance directly into a portal**, as they do today.
- Transitioning away from mainframe technology, market firms will have **access to the new LORS** portal, replacing existing portals which will not be available from cutover.
- The new cloud-based portal will offer enhanced security.
- Change impact is expected to be minimal as the new portal will **mirror the functionality** of the existing LORS portal, which will cease to be available.
- Minor process adjustments will occur as Velonetic will conduct sanctions checks.
- Select supported bespoke **EDI messages** will continue to be available. If not supported, then you will need to adopt a supported bespoke message as outlined in the [messaging](#) slides.
- Market firms will need to connect to **the market gateway (ASG Adept)** for message integration.
- There will be a **single sign on** alongside the other new portals, meaning you can access all the new portals from one place.
- **Management of user access** will move to the market firms, providing a faster more efficient way of onboarding/ deboarding.



## Additional information

- There may be changes in look and feel, as the screens will have a refresh. The data will be compatible with data held in the previous system.
- **Authorisation attributes** will still be place as they are today.
- Ahead of testing, you or your service provider will be provided with a **new URL**, along with a username, password and any other credentials necessary.
- Market firms should ensure they thoroughly understand any additional portals or applications they currently utilise, which may soon become unavailable. They need to assess the functionalities their current portals offer and understand how this will be replaced.
- Demos of the new LORS portal screens will be available. User manuals/training materials will be available.
- Ensure that you read these LORS slides in conjunction with the [digital services](#) slides
- You can **object or authorise transactions** as you do today.
- **Queries** will continue to be managed outside of LORS as they are today.
- LORS will continue to **automatically authorise** transactions after five days (if not responded to), as they do today.

Topic 	Activity 	Target outcome 	Target phase	People	Process	Tech
Mandatory changes	— All market firms will need to make technology changes and connect to the market gateway (ASG Adept) to be able to send and receive messages ( <a href="#">refer to the market gateway section</a> )	— Ensuring your full awareness of mandatory requirements will enable strategic considerations.	Onboarding			✓
	— All market firms must review their messages in accordance with the <a href="#">messaging section</a> of the guide, as some customisations will no longer be supported.	— Ensure that you are technically ready to adopt phase one digital services.	Testing			✓
	— All market firms who transact outward reinsurance will need to access the new LORS portal in phase one to be able to process outwards reinsurance transactions. <ul style="list-style-type: none"> <li>— Ensure that you have access to the new LORS screens. Note that the old portal will no longer be available after cutover.</li> </ul>	— Ensure that you are technically ready to adopt phase one digital services.	Onboarding			✓

# Digital services adoption activities: LORS for outward reinsurance submissions (2/3)

Work with your IT team to create your new LORS portal log in detail, and identify users

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Log in credentials and security specifications	<ul style="list-style-type: none"> <li>Obtain the new LORS URL once available from Velonetic and ensure this is whitelisted.</li> </ul>	<ul style="list-style-type: none"> <li>This is to ensure you have the location of the application so that you can access the landing page and add in your credentials.</li> </ul>	Onboarding			✓
	<ul style="list-style-type: none"> <li>Review your own security specifications and set-up authentication. Work alongside your IT team and/or service provider to ensure that users can access the portals (i.e. is the supported browser installed, e.g. Chrome etc.)</li> <li>Information on authenticator apps is included in the See <a href="#">onboarding guide</a>.</li> <li>Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one adoption.</li> <li>Ability to use a Multi-factor Authentication (MFA) app to login.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure the environment is compliant with your internal security requirements and your users can validate their access.</li> </ul>	Onboarding			✓
User management	<p>All market firms will need to manage onboarding and offboarding their users. Velonetic will no longer manage this, there will be no 'tickets' to raise. Actions will be immediate and within market firms own control.</p> <ul style="list-style-type: none"> <li>Identify the internal business processes and map your 'as is' processes and then map your 'to be processes'.</li> <li>Nominate your business as usual "administrators" (if different to programme onboarding admins) who will create new users, secure log in credentials and manage future joiners/leavers for DPS.</li> <li>All users will need to be set up for go live, after that time, it is management only.</li> </ul> <p>NB This is relevant for all portals. See <a href="#">onboarding guide</a>.</p>	<ul style="list-style-type: none"> <li>A change impact assessment should be completed (<a href="#">template available if required</a>). This impact assessment will provide a basis for adopting 'to be' processes. This activity will help define your 'to be' processes.</li> <li>Ensure the user admins are set up post go live, to manage the environment in a more flexible, proactive, nimble way.</li> <li>This will prevent time delays and ensure a fast, effective process for the future.</li> </ul>	Onboarding	✓	✓	✓

# Digital services adoption activities: LORS for outward reinsurance submissions (3/3)

Establish any impacts of using the new LORS portal, and define your future processes

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Impact on existing processes	<ul style="list-style-type: none"> <li>Determine if there are any impacts on current business processes; this solution serves as a replacement for an existing portal, thus necessitating minimal changes.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure there are no unforeseen process interruptions.</li> </ul>	Ongoing		✓	
Define future processes	<ul style="list-style-type: none"> <li>Develop your future business processes for LORS, and thoroughly evaluate and document the potential impacts. Any necessary changes should be minimal.</li> </ul>	<ul style="list-style-type: none"> <li>Defining your future processes will ensure that the impact of the changes are clear for the end-to-end processes</li> <li>A change impact assessment should be completed (<a href="#">template available if required</a>).</li> </ul>	Ongoing		✓	
Impact on existing IT processes and internal IT systems	<ul style="list-style-type: none"> <li>Establish if your internal systems interact with any of the portals/applications that will no longer be available. Document these changes and identify who is going to be responsible for making the changes (e.g. IT team, service provider, etc.)</li> <li>In the case that you need to make updates to your current technology/internal systems, obtain sign-off for the changes required and seek internal approval for the cost of making the changes.</li> <li>Inform your IT team/service provider of any changes required to internal systems to update the interaction with the new portals/applications; and keep track of progress.</li> </ul>	<ul style="list-style-type: none"> <li>This will prepare your IT team/service providers to make any IT process changes and ensure data can continue to flow and feed existing processes.</li> <li>This will ensure sufficient budget and resources will be made available to meet any development costs.</li> <li>This will ensure that any interaction can continue with the new screens.</li> </ul>	Ongoing			✓
Internal user training	<ul style="list-style-type: none"> <li>Velonetic will demo the screens and you will also be able to access training materials shortly.</li> <li>Make sure you have access to the Velonetic Education learning platform and signed up for any required instructor-led training sessions (see <a href="#">training</a> page on Velonetic website).</li> </ul>	<ul style="list-style-type: none"> <li>This will enable you to get a fuller understanding of the LORS solutions, and how this will work in practice.</li> </ul>	Training	✓		
	<ul style="list-style-type: none"> <li>Document the portal changes against the existing processes and update any user manuals.</li> <li><b>Note:</b> Ensure you obtain the Velonetic user manuals as a training aid (available on the learning platform).</li> </ul>	<ul style="list-style-type: none"> <li>This activity will help define your 'to be' processes.</li> <li>A change impact assessment should be completed (<a href="#">template available if required</a>).</li> </ul>	Training	✓		
	<ul style="list-style-type: none"> <li>Upskill users who will be using the new LORS screens by ensuring they have access to the training materials available.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure users are able capable of using the new LORS portal.</li> </ul>	Training	✓		



# Digital services: Document Repository Service (DRS) (IMR) (1/3)

Work with your IT team to create your Document Repository Service (DRS) log in and identify users



### Summary of the change

- The Document Repository Service **replaces the IMR**. Market firms will have access to the **new DRS replacing the existing IMR**, which will not be available from cutover.
- Market firms will retain the ability to **upload documents**, including claims documents into the Document Repository Service (DRS) portal as they do today in the IMR.
- Market firms will continue to **view premium and policy information**, in the Document Repository Service (DRS) as they do today. **Claims documents can also be viewed via ICOS**.
- Transitioning away from mainframe technology, this is a new cloud-based portal
- There will be a **single sign on (SSO)** alongside the other new portals, meaning you can access all the new portals from one place.
- Change **impact is expected to be minimal** as the new portal will mirror the functionality of the existing IMR portal, which will cease to be available.
- **Management of user access** will move to the market firms, providing a faster more efficient way of onboarding/ off boarding.
- Market firms will no longer have to request an **urgent reference** to prioritise the processing of a work package.



### Additional information

- There will be a **data migration** prior to cutover into the Document Repository Service.
- There will be two data sets for migration:
  - The IMR documents
  - The IMR meta data
- Carriers can also retrieve and upload documents **via Writeback**.
- The **document file viewer** will also be available, as it is today .
- Market firms can still view **work package status** in the DRS, as you do today in the IMR.
- Ahead of testing, you or your service provider will be provided with a **new URL**, along with a username, password and any other credentials necessary.
- There may be changes in look and feel, as the screens will have a refresh. The data will be compatible with data held in the previous system.
- Demos of the new Document Repository Service (DRS) screens will be available. User manuals/training materials will be available.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	<ul style="list-style-type: none"> <li>— All market firms must use the Document Repository Service (DRS) to view and upload documents, if you use the IMR today</li> </ul>	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> </ul>	Onboarding			✓
Using DRS	<p>Change impact will be nominal, and carriers will retain the same capabilities within the new portal as they do today in the IMR but will need to access via the DRS.</p> <ul style="list-style-type: none"> <li>— All market firms must use the Document Repository Service (DRS) to view and upload documents, as they do today in the IMR.</li> <li>— Ensure that you have access to the screens. Note that the old IMR portal will no longer be available after cutover.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that you are technically ready to adopt phase one.</li> </ul>	Testing			✓

# Digital services: Document Repository Service (DRS) (IMR) (2/3)

Establish your log in details and log ins

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Log in credentials and security specifications	<ul style="list-style-type: none"> <li>Obtain the new <b>Document Repository Service (DRS) URL</b> once available from Velonetic and ensure this is whitelisted.</li> <li>Review your own security specifications and set-up authentication. Work alongside your IT team and/or service provider to ensure that users can access the portals (i.e. is the supported browser installed chrome installed, e.g. Chrome etc.)</li> <li>Information on authenticator apps is available in the <a href="#">onboarding pack</a>.</li> <li>Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one adoption.</li> <li>Ability to use a Multi-factor Authentication (MFA) app to login.</li> </ul>	<ul style="list-style-type: none"> <li>This is to ensure you have the location of the application so that you can access the landing page and add in your credentials.</li> <li>This will ensure the environment is compliant with your internal security requirements.</li> </ul>	Onboarding			✓
User management	<p>All market firms will need to manage onboarding and offboarding their users. Velonetic will no longer manage this, there will be no 'tickets' to raise. Actions will be immediate and within market firms' own control.</p> <ul style="list-style-type: none"> <li>Identify the internal business processes and map your 'as is' processes and then map your 'to be processes'.</li> <li>Nominate your business as usual "administrators" (if different to programme onboarding admins) who will create new users, secure log in credentials and manage future joiners/leavers for DPS.</li> <li>All users will need to be set up for go live, after that time, it is management only.</li> </ul> <p><b>NB</b> This is relevant for all portals. <a href="#">See onboarding guide</a>.</p>	<ul style="list-style-type: none"> <li>A change impact assessment should be completed (<a href="#">template available if required</a>). This impact assessment will provide a basis for adopting 'to be' processes. This activity will help define your 'to be' processes.</li> <li>Ensure the user admins are set up post go live, to manage the environment in a more flexible, proactive, nimble way.</li> <li>This will prevent time delays and ensure a fast, effective process for the future.</li> </ul>	Onboarding	✓	✓	✓

# Digital services: Document Repository Service (DRS) (IMR) (3/3)

Define your future processes and train your users

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Impact on existing processes	<ul style="list-style-type: none"> <li>Determine if there are any impacts on current business processes; this solution serves as a replacement for an existing portal, thus necessitating minimal changes.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure there are no unforeseen process interruptions.</li> </ul>	Ongoing		✓	
Define future processes	<ul style="list-style-type: none"> <li>For Carriers, the DRS will serve as it does today in the IMR to facilitate uploading and viewing documents, so there will be minimal change to process. However, firms should evaluate and document the potential impacts. Any necessary changes should be minimal.</li> </ul>	<ul style="list-style-type: none"> <li>Defining your future processes will ensure that the impact of the changes are clear for the end-to-end processes (utilising IMR submission functionality).</li> <li>A change impact assessment should be completed <a href="#">(template available if required)</a>.</li> </ul>	Ongoing		✓	
Impact on existing IT processes and internal IT systems	<ul style="list-style-type: none"> <li>Establish if your internal systems interact with any of the portals/applications that will no longer be available. Document these changes and identify who is going to be responsible for making the changes (e.g. IT team, service provider, etc.)</li> <li>In the case that you need to make updates to your current technology/internal systems, obtain sign-off for the changes required and seek internal approval for the cost of making the changes.</li> <li>Inform your IT team/service provider of any changes required to internal systems to update the interaction with the new portals/applications; and keep track of progress.</li> </ul>	<ul style="list-style-type: none"> <li>This will prepare your IT team/service providers to make any IT process changes and ensure data can continue to flow and feed existing processes.</li> <li>This will ensure sufficient budget and resources will be made available to meet any development costs</li> <li>This will ensure that any interaction can continue with the new screens.</li> </ul>	Ongoing			✓
Internal User training	<ul style="list-style-type: none"> <li>Velonetic will demo the screens and you will also be able to access training materials shortly.</li> <li>Make sure you have access to the Velonetic Education learning platform and signed up for any required instructor-led training sessions (see <a href="#">training</a> page on Velonetic website).</li> </ul>	<ul style="list-style-type: none"> <li>This will enable you to get a fuller understanding of the solution, and how this will work in practice.</li> </ul>	Training	✓		
	<ul style="list-style-type: none"> <li>Document the portal changes against the existing processes and update any user manuals.</li> <li><b>Note:</b> Ensure you obtain the Velonetic user manuals as a training aid (available on the learning platform).</li> </ul>	<ul style="list-style-type: none"> <li>This activity will help define your 'to be' processes.</li> <li>A change impact assessment should be completed <a href="#">(template available if required)</a>.</li> </ul>	Training	✓		
	<ul style="list-style-type: none"> <li>Upskill users who will be using the new DPS DRS screens by ensuring they have access to the training materials available.</li> </ul>	<ul style="list-style-type: none"> <li>This will ensure users are able capable of using the new portal in phase one.</li> </ul>	Training	✓		

# Reporting adoption activities (1/2)

Establish any impact of the new self-serve reporting approach on existing process



## Summary of the change

- The way in which you **access your reports from Velonetic is changing**. Reports will **no longer be emailed to you**, and instead a self-serve approach will be introduced.
- Reporting will be via a self-serve pull capability, allowing users to **download reports directly** from the online service.
- Functionality from existing reporting portals/apps (e.g. Claims reporting suite (CRS) Brio, Infoview) will be **replaced by the web-based reporting portal 'Qlik Sense'**.
- Qlik Sense allows users to **view reports online and to download reports** in excel/CSV/PDF format. The data will be extracted straight from DPS platforms, so all data will be the same format.
- All the reports that you receive today will be available in **Qlik Sense** from phase one, **including any bespoke reports**.
- ◆ Access to Qlik Sense will be set up on an **individual user basis**, necessitating a list of all of the people that will require access (e.g. existing email recipients and users of a generic mailbox).





## Additional information

- Reporting changes do not apply to **Scheme Canada**. Reporting will still be via TELUS as it is today.
- There will be a **single sign on (SSO)** alongside the other new portals, meaning you can access all of the new portals from one place.
- Users will be set up by your internal User Administrators as part of the go live onboarding process.
- Once Qlik Sense is available to view, use the service catalogue to view all the available reports (note that report names & references will stay the same). You will also be able to set up any additional reports at that stage.
- ◆ Market firms will get earlier sight of data; current SLAs will be maintained but reports should be available earlier than they are today (e.g. monthly reporting should be available earlier).
- ◆ If you currently have **automated data feeds**, there is the option to have reporting data sent to your SFTP site if needed.

Topic	Activity	Target outcome	Target phase	People	Process	Tech
Mandatory changes	◆ All market firms must be able to access the reporting portal (Qlik Sense) to view and download reports.	<ul style="list-style-type: none"> <li>— Ensuring your full awareness of mandatory requirements will enable strategic considerations.</li> <li>— Ensure that you are technically ready to adopt phase one digital services.</li> </ul>	Testing			✓
Impact on existing reports	<ul style="list-style-type: none"> <li>◆ Review your list of current Velonetic reports (especially bespoke reports) and decide whether they are still required. You should have received this Velonetic reporting list via email in January 24.</li> <li>◆ If you receive any additional reports that are not referenced in the reporting list shared by Velonetic, please let your engagement partner know so that they can work with Velonetic to identify them.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that that your reporting and distribution process is simplified and optimised ahead of migration to the new reporting tool (e.g. ensuring redundant reports are not recreated).</li> </ul>	Ongoing		✓	
	◆ Establish and document which of the reporting and MI portals/applications (e.g. Brio/Infoview) you use today will be replaced by the Qlik Sense tool.	<ul style="list-style-type: none"> <li>— This will ensure that recipients will continue to be able to receive or to access the reports they need.</li> </ul>	Ongoing		✓	
Impact on current report owners	◆ Identify and make a list of current report owner(s) for each report that will continue to be used.	<ul style="list-style-type: none"> <li>— This stakeholder list will help ensure all impacted stakeholders are informed of the changes.</li> </ul>	Ongoing	✓		
	<ul style="list-style-type: none"> <li>◆ For any current reporting email recipients, ensure that these people are still with your firm and are informed of the changes to how reports will be accessed after phase one cutover.</li> <li>◆ If the email address is shown as a “generic” mailbox, you will need to list out the people who require access to the reports to get them up in Qlik Sense, as generic mailbox emailing will not be possible.</li> </ul>	<ul style="list-style-type: none"> <li>— A stakeholder analysis should be completed (<a href="#">templated available if required</a>).</li> </ul>	Ongoing	✓		◆ Update made since v2

# Reporting adoption activities (2/2)

Establish any impact of the new self-serve reporting approach on current report owners and reporting processes

Topic	Activity 	Target outcome 	Target phase	People	Process	Tech
Agree new users	<ul style="list-style-type: none"> <li>◆ Agree who within your firm should have access and update the relevant stakeholder lists.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure an approved level of access for any users who you would like to have access to the enhance self-service reporting capabilities.</li> </ul>	Ongoing	✓		
Impact on reporting processes	<ul style="list-style-type: none"> <li>— Document your report generation and distribution process today (e.g. received by email/SFTP and manually actioned or automated processes in place) and define how this process will be updated post phase one go-live.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that recipients will continue to be able to receive or to access the reports they need.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>— Document your future state reporting process and the changes required in users' current ways of working.</li> <li>— Update any user manuals to reflect the new reporting process (e.g. report names, collection method, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>— To ensure a smooth transition to the self-service reporting system and provide clear guidance for users.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>◆ If you currently have aggregated reports or data which feeds into your internal systems, please advise your EP, who will connect you with the reporting team, to consider the best way forward.                             <ul style="list-style-type: none"> <li>◆ Understand whether you have aggregated reports, as these reports will need to be collected via SFTP</li> <li>◆ Understand whether you have an automated process that feeds report data into other databases, as you will need to pull the raw data in different way to continue that process.                                     <ul style="list-style-type: none"> <li>○ In the short-term, reporting data can be provided via secure file transfer (all Velonetic customers should have the capability to utilise SFTP). Customers who want to use this facility must reach out to their engagement partner directly who will connect them with the reporting team, to agree the best solution.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that data can still be fed from reports into other databases from phase one go-live.</li> </ul>	Ongoing			✓
Impact on existing IT processes and internal IT systems	<ul style="list-style-type: none"> <li>◆ Establish the impact of the current reporting portals being stood down on existing technology/systems, including any impact on any automated processes.</li> <li>◆ Assess, define and document any changes that will need to be made to existing systems when replaced by self-service reporting.</li> </ul>	<ul style="list-style-type: none"> <li>— Documenting any technology changes will ensure you are on track to connect to the reporting tool once phase one goes live.</li> </ul>	Ongoing		✓	✓
	<ul style="list-style-type: none"> <li>◆ In the case that you need to make updates to your current technology/internal systems, obtain sign-off for the changes required and seek internal approval for the cost of making the changes.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure sufficient budget and resources will be made available to meet any development costs.</li> </ul>	Ongoing		✓	
	<ul style="list-style-type: none"> <li>— In the case that you need to make updates to your existing technology/systems as a result of reporting changes, inform your IT team/service provider of any changes required; and keep track of progress.</li> </ul>	<ul style="list-style-type: none"> <li>— This will ensure that reporting can continue with the new digital services.</li> </ul>	Ongoing			✓



## 05

## Changes to portals and applications

This section sets out a list of portals and applications which will not be available from cutover. You can use this section to facilitate a workshop with your team on the portals/apps currently used, the subsequent relocation of the functionality, the impact to existing IT processes and internal IT systems, and the actions you will need to take prior to cutover.

A [portals/applications Excel tracker](#) is provided to facilitate your analysis.

# LPC/Casa services will be accessed via ICOS & IPOS after cutover

Below is a list of the portals and applications which will not be available after phase one cutover. The functionality will remain but will be moved and accessed differently. The new portals/apps may require you to access new screens via new URLs. In some instances, you will also need new messaging IP addresses and security protocols as shown below.

	Portal/app name	URL	Purpose	Functionality moving to	New messaging IP address/ security protocols
Services available through London Processing Centre (LPC)	<b>London Processing Centre (LPC)</b> A.k.a. Casa	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	<b>3270 mainframe screen scraper. Presents mainframe screens via a web browser. Allows some screen design customisation for branding. Single access point for multiple mainframe, including LORS, PoSH, CLASS (Claims Loss and Advice Settlement System). Allows users single sign-on to these applications via portal SSO.</b>	ICOS	Yes*
	• PoSH	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	Policy History for companies but also covers facultative (FAC), excess of loss (XOL) and Treaty data entry, corrections, enquiry etc. Batch EOD (End of Day) process drives messaging, settlement and reporting.	IPOS	No
	• CLASS	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	Enables carriers to load claim transactions and supporting material online. Enables claims to be accepted/rejected online using a messaging system.	ICOS	No
	• DMS	<a href="https://ins.xchanging.com/">https://ins.xchanging.com/</a>	Screen for brokers to manage UCR/UMR and upload IMR documents while in the process of entering claims details into CLASS.	IPOS & ICOS	No
	◆ LORS	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	— Electronic accounting application, which enables online transactions between brokers and underwriters. Enables brokers to submit electronic credit/debit notes to underwriters, and for them to be processed via central online system. — Syndicates use to pay for re-insurance and receive claims. Brokers use to provide details to syndicates for the re-insurance purchased.	LORS**	No
	• General Enquiries (LPC)	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	LPC menu entry: — General enquiries — Online viewer into the central settlement database	ICOS	Yes
	• Security Administration (LPC)	<a href="https://casa.xchanging.com/">https://casa.xchanging.com/</a>	LPC menu entries: — Security administration — Utility to manage user admin. This application is also used by brokers for instance to whom Xchanging delegate the control of their own users and access.	Parties Portal	No

\* Further details to be confirmed ahead of testing

\*\* NB. LORS will remain a standalone system and will be via a new portal

# Insurance Portal, ECF and PbS services to be accessed via ICOS & IPOS

Below is a list of the portals and applications which will not be available after phase one cutover. The functionality will remain but will be moved and accessed differently. The new portals/apps may require you to access new screens via new URLs. In some instances, you will also need new messaging IP addresses and security protocols as shown below.

	Portal/app name	URL	Purpose	Functionality moving to	New messaging IP address/ security protocols
Insurance Portal services	<b>Insurance portal</b>	<a href="https://insuranceportal.xchanging.com/">https://insuranceportal.xchanging.com/</a>	<b>Portal as entry point to premium (and for brokers, claims) systems. Holds user and organisation details for market participants.</b>	IPOS & ICOS	No
	• PortalSSO	<a href="https://insuranceportal.xchanging.com/">https://insuranceportal.xchanging.com/</a>	A standalone LDAP-backed SSO distinct from the ECF2 SSO. Sits on insurance portal and allows SSO access to Class, PoSH and LORS.	IPOS & ICOS	No
	• PremTRK	<a href="https://insuranceportal.xchanging.com/">https://insuranceportal.xchanging.com/</a>	Tracks the Velonetic processing of submitted premiums and tracks queries on any work (no longer used for paper, only electronic).	IPOS	No
	• Knowledge Base	<a href="https://insuranceportal.xchanging.com/">https://insuranceportal.xchanging.com/</a>	Subset of Insurance Portal. Holds business reference data/knowledge to assist processing.	◆ Knowledge base Portal	No
	• Market Directory	<a href="https://diradmin.xchanging.com/">https://diradmin.xchanging.com/</a>	The portal from which various pieces of market information can be ascertained - sub application within Insurance portal.	IPOS & ICOS	No
ECF services	<b>Electronic Claim File (ECF2)</b>	<a href="https://sso.xchanging.com/">https://sso.xchanging.com/</a>	<b>Supports the electronic processing of claims through interfaces with CLASS and the IMR, as well as providing enhanced functionality to enable its users to share documents and process claim transactions, eliminating paper and reducing turnaround times for claims processing.</b>	ICOS	Yes
	• ECF2 Single Sign-On [ECF2SSO]	<a href="https://sso.xchanging.com/">https://sso.xchanging.com/</a>	Allows users to sign onto applications needed for ECF processing with one sign on.	ICOS	Yes
	• Claims Workflow Trigger (CWS)	<a href="https://sso.xchanging.com/">https://sso.xchanging.com/</a> <a href="https://ins.xchanging.com/">https://ins.xchanging.com/</a>	CWS uses CWT (Claims Workflow Triggers) to provide a claims workflow service for external users that are registered.	ICOS	Yes *
	• CAS (Claims Agreement Screen)	<a href="https://ins.xchanging.com/">https://ins.xchanging.com/</a>	Web screens in ECF2 (Electronic Claim File), interfacing to mainframe back end for agreeing ECF2 claims. Uses Attunity connection into mainframe.	ICOS	No
	• DFV	<a href="https://ins.xchanging.com/">https://ins.xchanging.com/</a>	PDF view of IMR documents - part of ECF2 and access is via CAS once a claim is selected.	IPOS & ICOS	No
PbS	<b>PbS Online Query Portal</b>	<a href="https://sso.xchanging.com/">https://sso.xchanging.com/</a>	<b>Part of the PbS service. Provides capability for brokers, carriers and BPS technicians to create &amp; respond to submission queries. Query response would be in the form of adding narrative or uploading documents via the portal to the IMR.</b>	IPOS & ICOS	Yes *

\* Further details to be confirmed ahead of testing

# Reporting portals & apps being replaced by Qlik Sense after cutover

Below is a list of the portals and applications which will not be available after phase one cutover. The functionality will remain but will be moved and accessed differently. The new portals/apps may require you to access new screens via new URLs. In some instances, you will also need new messaging IP addresses and security protocols as shown below.

	Portal/app name	URL	Purpose	Functionality moving to	New messaging IP address/ security protocols
Reporting portals and apps	CRS Reporting	<a href="http://crs.lloyds.com">http://crs.lloyds.com</a>	Lloyd's Claims Reporting via Qlikview application.	Qlik Sense	No
	Infoview	<a href="https://insprd.xchanging.com/InfoViewApp/logon.jsp">https://insprd.xchanging.com/InfoViewApp/logon.jsp</a>	Used by Internal and External parties to access reports created by Business Objects Reporting (BO).	Qlik Sense	No
	QlikView Reporting	<a href="https://mi.xchanging.com">https://mi.xchanging.com</a>	MI Analytics using data from multiple sources. The transition to Qlikview will introduce more of a self-serve approach – further details on adopting new reporting processes are available on page 44.	Qlik Sense	Yes *
	Itemised Billing Breakdown Facility *	<a href="http://itemisedbilling.xchanging.com/">http://itemisedbilling.xchanging.com/</a>	Application that allows registered users to request a breakdown of their charging advices to a transactional level.	Qlik Sense	No
	Brio Reporting	Emails are sent to external users	The front-end, reports and schedules built in the tool - fronting Tactical Data Warehouse (TDW). No external user access, all reports sent via email.	Qlik Sense	No
	Genesys	Emails are sent to external users	Generic Email System. Sends reports or files triggered by mainframe jobs as .csv attachments to e-mail.	Qlik Sense	No
	Generic Reporter	Emails are sent to external users	Tool for requesting complex reports to be run on TDW. Reports are distributed using email.	Qlik Sense	No
	Business Objects Reporting [BO]	Emails are sent to external users, or report shared via infoview	Application to generate MI reports against data on Strategic Data Warehouse (SDW) and Claims Data Warehouse (CDW). Emails sent to external users.	Qlik Sense	No
Account Enquiry	<b>Account Enquiry</b>	<a href="http://accountenquiry.xchanging.com/">http://accountenquiry.xchanging.com/</a>	<b>Application that allows internal and external users to enquire on Premium and Treaty transactions processed by LIDS (Lloyd's Insurance Data System) online.</b>	IPOS & ICOS	No




\* Further details to be confirmed ahead of testing





# Portals & apps moving to the market gateway (ASG Adept), or no change

The market gateway (ASG Adept) will need new messaging IP addresses and security protocols as shown below. The IMR will also require you to access new screens via new URLs. However, a number of portals/apps (indicated at the bottom of the page) will not change.

	 Portal/app name	 URL	 Purpose	Functionality moving to	New messaging IP address/ security protocols
XAG/XDH/XSH Gateways	Xchanging ACORD Gateway [XAG]	<a href="https://xag.xchanging.com">https://xag.xchanging.com</a>	Messaging Gateway receiving, translating and forwarding the incoming & outgoing messages from brokers, carriers, service providers and syndicates for the following services – DRI (A&S and ECF), eAccounts, PbS (Query portal), Writeback, Acord4All.	Market gateway (ASG Adept)	Yes*
	Xchanging Distribution Hub [XDH]	<a href="https://xfiles.xchanging.com">xfiles.xchanging.com</a> <a href="https://xfilessoap.xchanging.com">xfilessoap.xchanging.com</a>	Receipt, delivery and transformation application supporting various services that transact data between internal applications and external users (and vice -versa), predominantly EDI messaging.	Market gateway (ASG Adept)	Yes*
	Xchanging File Gateway [XFG]	<a href="https://xfiles.xchanging.com">xfiles.xchanging.com</a>	Part of the XDH Service (XA0052). B2B Managed File Transfer Solution providing the SFTP front end to XDH. XFG is based on IBM Sterling File Gateway technology platform.	Market gateway (ASG Adept)	Yes*
◆ IMR	IMR Content Navigator [ICN] *	<a href="https://repository.xchanging.com/">https://repository.xchanging.com/</a>	Web front end of the IMR application. Includes the custom plug-ins built on top of the core IBM Content Navigator product, for claims, web pages.	Document repository service	Yes*
No change	Model Wordings Library [MWL] *	<a href="https://mwl.xchanging.com">https://mwl.xchanging.com</a>	Web based electronic library of information. Serves across different parties for policy production/checking.	N/A	No
	PDF Conversion and Stitching [PCS] *	<a href="https://repository.xchanging.com/">https://repository.xchanging.com/</a>	A feature within the IMR UI which allows for the real-time addition of docs to a 'shopping cart' for conversion into a PDF. Little used by the market, and really just a technical component of the IMR UI - not a separate app.	N/A	No

◆ • Further details to be confirmed ahead of testing  
\*\* NB eAccounts will not be available post cutover



## Appendix

1. Resources and further reading
2. Glossary



# Phase one: resources and further reading

## Resources and further reading

### Phase one

- [Blueprint Two event recordings and slides](#)
- [Blueprint Two monthly newsletter](#)
- [Frequently asked questions](#)
- [Onboarding guide](#)
- [Testing](#)
- [Training](#)
- [EDI information](#)
- [Ask questions](#)

### Related to this guide

- [Stakeholder Analysis Tool](#)
- [Change Impact Assessment Tool](#)
- [Change Plan Template](#)
- [Portals/Applications Tracker \(Excel\)](#)

### Key links:

- [Blueprint Two website](#)
- [Velonetic website](#)
- [Engagement Partners](#)
- [‘What’s new?’ page](#)

### Other useful links:

- [London Market Group Data Council](#)
- [ACORD](#)
- [Core Data Record \(CDR\)](#)
- [LIMOSS Market Business Glossary](#)
- [Blueprint Two Adoption Guide assets](#)

### Background reading:

- [Phase one overview](#)
- [Blueprint Two Solutions](#)
- [Quarterly Progress Update](#)
- [Customer Journeys](#)
- [DA market walk-through \(Phase one FAQs\)](#)

Ask a question



# Glossary

Acronym	Title	Further Information
<b>ACORD</b>	Association for Cooperative Operations Research and Development	A non-profit organisation which publishes and maintains an archive of standard forms and message types to support the exchange of data between brokers and insurers.
<b>ASG Adept</b>	The market gateway (ASG Adept)	The ACORD Gateway handles the messaging, validates and translates the data and routes the submissions.
<b>CAS</b>	Claims Agreement Screen	An enhancement to ECF, delivered in the ECF2 implementation, to improve the ease by which an insurer can agree a claim.
<b>Cash LPAN</b>	Cash LPAN	Is and instruction to sign and settle which does not require and additional instruction from the broker.
<b>CDR</b>	Core Data Record	A set of standardised, quality transactional data, that empowers downstream processing. The placement processing data, created at the point of bind when enhanced with derived data, will form the Core Data Record and will be the single point of reference which connects all subsequent processes, including accounting, payment, claims and endorsements.
<b>CLASS</b>	Claims Loss and Advice Settlement System	A claims workflow system initially developed for the IUA and extended to the Lloyd's market, which enables brokers to load claim data and supporting documents so that insurers can agree, query, and reject claims.
<b>CWS</b>	Claims Workflow Services	A service provided by XIS/XCS using ECF2 enabling insurers to connect to a central claims workflow service. Used by insurers that do not use wish to develop their own claims workflow system. See also 'Claims Workflow Triggers' (CWT).
<b>CWT</b>	Claims Workflow Trigger	An enhancement to ECF, delivered in the ECF2 implementation. The Triggers (messages) are fed into an insurers own claims workflow system. See also 'Claims Workflow Service' (CWS).
<b>Data Store</b>	The Data Store	The new central repository for the Core Data Record (CDR). The Data Store will only contain post bind data.
<b>De- Linked LPAN</b>	De- Linked LPAN mainframe	Required 2 separate instructions. The signing will happen and a separate release is required to move the money

Acronym	Title	Further Information
<b>DFV</b>	Document File Viewer	An enhancement to ECF, delivered in the ECF2 implementation, that 'stitches together' the claims documents related to a specific claim into a single document.
<b>Digital Gateway</b>	The Digital Gateway	An automated risk data validator that enriches the CDR for central processing.
<b>DMS</b>	Document Management Screens	A computerised system used to store, share, track and manage files or documents.
<b>DRI</b>	Document Repository Interoperability	An ACORD technical standard that supports the automatic interchange of free-format documents between repositories.
<b>DPSA</b>	Digital Processing Service Agreement	
<b>EBOT</b>	Electronic Back Office Transactions	An ACORD standard specification; the business data and rules required for conducting electronic business interactions from system to system, dealing with the usage of ACORD technical account and financial account messaging.
<b>ECF</b>	Electronic Claim File	Current market system to enable insurers to review and correspond on claims.
<b>ECOT</b>	Electronic Claims Office Transactions	The use of ACORD messages for the management of the claims process.
<b>EDI</b>	Electronic Data Interchange	Electronic Data Interchange (EDI) is computer-to-computer exchange of business documents in a standard electronic format to replace e-mail/post, etc.
<b>FA</b>	Financial Account	The Financial Account is submitted once the Technical Account has been submitted successfully and is the settlement advice, where payment goes ahead immediately.

# Glossary

Acronym	Title	Further Information
<b>FNOL</b>	First Notification of Loss Claims Submission	First Notification of Loss (FNOL) submissions can be submitted through Claims Office Transactions (ECOT), an Application Programming Interface (API), portal, or LIMCLM (London Market Claims Message). The FNOL and routing function will, receive and validate the claims notification, retrieve the relevant policy data from the data store and validate coverage then route to the appropriate handling channel.
<b>FTP</b>	File Transfer Protocol	A standard communication protocol used for the transfer of computer files from a server to a client on a computer network.
<b>ICOS</b>	International Claims Orchestration Service	The product underpinning the Digital Claims Processing Services.
<b>ICN</b>	IMR Content Navigator	
<b>IMR</b>	Insurers' Market Repository	Infrastructure owned and funded by London market insurers, both Lloyd's and companies, which provides a common repository for documentation to support accounting and settlement and claims processes.
<b>IPOS</b>	International Premiums Orchestration Service	The product underpinning the Digital Premium Processing Services.
<b>LPAN</b>	London Premium Advice Note	
<b>LIDS</b>	Lloyd's Insurance Data System	The XIS internal system used to process and store risk premium and policy history for the Lloyd's market.
<b>LORS</b>	Lloyd's Outward Reinsurance Scheme	An XIS system that replaced the submission of reinsurance credit/debit notes to LPSO (XIS) for data entry to support the processing of reinsurance of Lloyd's Syndicates. The system provides a broker and underwriter service that is interoperable between messaging ('EDI') and an online ('interactive') platform.
<b>MRC</b>	Market Reform Contract	The standard for insurance contracts in the London market, established by the IUA, LIIBA and LMA.

Acronym	Title	Further Information
<b>MRC v3</b>	Market Reform Contract version 3	A data-driven, structured contract that enables extraction of key placement processing data. This will replace the MRC.
<b>MWL</b>	Model Wordings Library	The Model Wordings Library provides market participants with access to established model wordings and clauses which are in current use, in all lines of business, against which slips/MRC can be referenced.
<b>Non-Fundamental Splits</b>	Non-Fundamental Splits	The breakdown of a premium payment into smaller amounts to achieve a level of transaction that meets Lloyd's Tax and Regulatory requirements.
<b>PoSH</b>	Policy Signing History	The XIS internal system used to process and store risk premium and policy history for the London companies' market. See also LIDS and APIX.
<b>PCS</b>	PDF Conversion and Stitching	
<b>Query Management</b>	Query Management	The ability to raise and deal with two-way queries between the parties in real time.
<b>Reach-back</b>	Reach-back	If there is no existing claims history, a process is triggered to fetch heritage data from the legacy claims systems.
<b>SND</b>	Signing number and date	
<b>TA</b>	Technical Account	The Technical Account is the data provided in the ACORD format which allows the receiving party to validate and process the Technical Account
<b>Tax Calculator</b>	Tax Calculator	The Tax Calculator will ensure the direct taxes applicable to insurance premiums are calculated accurately. The tax calculations will be recorded in the Core Data Record (CDR).

# Glossary

Acronym	Title	Further Information
<b>TDW</b>	Tactical Data Warehouse	
<b>UCR</b>	Unique Claim Reference	A reference applied to a claim record being processed through Central Services.
<b>UMR</b>	Unique Market Reference	The primary reference created by brokers and used by the Market to identify a contract.
<b>USM</b>	Underwriters Signing Message	The EDI message to support premium advices transmitted to Lloyd's Syndicates.
<b>Writeback</b>	Writeback	The technology driven by data that allows insurers to operate entirely from within their own systems without direct recourse to the central systems provided by XIS; it gives insurers the ability to view data and documents currently available in ECF and the IMR through their own systems.
<b>XAG</b>	Xchanging ACORD Gateway	Messaging gateway receiving, translating and forwarding the incoming & outgoing messages from Brokers, Carriers, Service Providers and Syndicates for the following services - DRI (A&S and ECF), eAccounts, PbS, Writeback, Acord4All.
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