



# Project Vanguard Report

**August 2023**

This material has been produced by Velonetic for the London insurance market as part of the Blueprint Two programme.



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# Progress

## Achieved in last month

1. Vanguard contracts (including terms of use, data, notice period) sent to all participants. Responses required during September
2. Test plans for connectivity & ACORD testing in September finalised
3. Vanguard participants aligned with 3-in-the-box design consultation
4. Vanguard test environment confirmed for 1 Sep 2023
5. PPL & Whitespace will join Vanguard in Jan 2024 to support CDR creation testing
6. Training engagement agreed with TMK, Amlin, and Howden
7. Operational Change Management kicked off to support Oct testing

## Current activity

1. PI10 Scope & Test plans shared by JV Assurance. October test planning underway
2. Resource planning and project team introductions in place for Groups 1&2.
3. Resource uplift underway to grow teams for Groups 3-6.

## Risks and issues

1. Require increase in UAT test scope clarity - being addressed with Velonetic Assurance
2. Require end-user design documentation - escalated with Velonetic team
3. Further Resources needed to maintain pace with increased Vanguard size

## Participants met in last month

- ✓ Canopus
- ✓ TMK
- ✓ Howden
- ✓ Griffiths & Armour
- ✓ Aon
- ✓ Acrisure
- ✓ Hamilton
- ✓ Chesterfield
- ✓ Antares
- ✓ Bretton Woods
- ✓ AJ Gallagher
- ✓ Global-Aero
- ✓ Lockton
- ✓ Beazley

	Stage	Qualified	Confirmed	Plan	TESTING				
					Connectivity	PI10 (User Interfaces)	PI11 (EDI Testing)	PI12 (Digital Phase 1)	PI13 (Digital Phase 2)
Group 1	AXA	✓	✓	✓	✓	October	December / January	April	
	WTW	✓	✓	✓	✓	October	December / January	April	
	Swiss Re	✓	✓	✓	✓	October	December / January	April	
Group 2	Howden	✓	✓	In progress	September	October	December / January	April	
	Marsh	✓	✓	Pending dates	September	October	December / January	April	
	Amlin	✓	✓	In progress	September	October	December / January	April	
	TMK	✓	✓	In progress	September	October	December / January	April	
	ES Risk	✓	✓	Pending dates	September	October	December / January	April	
Group 3	Zurich	✓	✓	Pending dates	October	November	December / January	April	
	Aon	✓	!						
	Hiscox	✓	✓	Pending dates	October	November	December / January	April	
	Travelers	✓	✓	Outstanding	October	November	December / January	April	
Group 4	Amwins	✓	Pending Response						
	Lockton	✓	✓	In progress	October	November	January	April	
	Acrisure	✓	✓	Pending dates	October	November	January	April	
	Beazley	✓	✓	Pending dates	January	January	January	April	
	Canopus	✓	✓	Pending dates	October	November	January	April	
Group 5	Hamilton	✓	! Late Joiner						
	Chesterfield	✓	! Late Joiner						
	Griffiths & Armour	✓	✓	Pending dates	Manual Testing only		January	April	
	Allianz	✓	✓		January	January	January		
Group 6	Antares	✓	! Late Joiner						
	Gallagher	✓	! Late Joiner						
	Bretton Woods	✓	✓ Late Joiner	Pending dates	Manual Testing only		January	April	
	Global Aero	✓	Pending Response						
	Guy Carpenter	✓	✓				January	April	
	Sompo	October '24		Late Joiner	Pending dates				





# Vanguard London Market scope (as at 23/08 & subject to change)

Test Dates		October 2023	December/January 2023/24	April 2024	Jul 2024
Test Scope	Premium	<ul style="list-style-type: none"> <li>* Portal submission</li> <li>* Portal Brexit (excl auto RI)</li> <li>* Portal triage and assignment</li> <li>* TA/FA validation</li> </ul>	<ul style="list-style-type: none"> <li>* Premium submission workflow</li> <li>* Portal Technician data capture</li> <li>* Portal (A&amp;S), MTBC, facilities and lineslips, auto RI Brexit</li> <li>* EBOT submissions</li> <li>* EDI submissions</li> <li>* Portal splits</li> <li>* XIS validations</li> </ul>	<ul style="list-style-type: none"> <li>* Portal Premium processing &amp; rules workflow</li> <li>* EBOT submission, Scheme Canada, LPAN submissions, surplus lines, NIAC</li> <li>* LORS</li> <li>* BDX V5 submissions</li> </ul>	
	Claims	<ul style="list-style-type: none"> <li>* Claims portal (submission &amp; processing)</li> <li>* Public private comments</li> <li>* Portal submission enhancements</li> <li>* CWT</li> </ul>	<ul style="list-style-type: none"> <li>* CWS</li> <li>* Writeback enhancements</li> <li>* LMCLM</li> <li>* Portal for Technicians</li> <li>* Triage, validation, and rules workflow</li> </ul>	<ul style="list-style-type: none"> <li>* Claims Workflow</li> <li>* Scheme Canada</li> <li>* Reinsurance</li> <li>* DA enhancements</li> <li>* LORS</li> </ul>	
	Support	<ul style="list-style-type: none"> <li>* Party administration; self-administer organisational preferences</li> <li>* Submissions &amp; grouping in line with ACORD</li> </ul>	<ul style="list-style-type: none"> <li>* Settlements STFO, RBS integration and scheme Canada enhancements</li> <li>* Party administration; subscription business enhancements and invoicing</li> <li>* EDI, DRI notifications</li> </ul>	<ul style="list-style-type: none"> <li>* Party administration; MTBC capability and knowledge base</li> <li>* DA Enhancements</li> <li>* Invoicing</li> <li>* MTBC</li> </ul>	
	Data	<ul style="list-style-type: none"> <li>* Data lake and warehouse setup and modelling</li> </ul>	<ul style="list-style-type: none"> <li>* Model all message types</li> </ul>	<ul style="list-style-type: none"> <li>* EDI messaging and legacy reach back</li> <li>* Premium, claims, risk and settlement reporting</li> </ul>	
	DA			<ul style="list-style-type: none"> <li>* DA Phase One (BDX driven)</li> </ul>	
	Gateway		<ul style="list-style-type: none"> <li>* Soft gateway call</li> <li>* Retrieve base CDR</li> <li>* Endorsements</li> <li>* Premium apportionment</li> </ul>		<ul style="list-style-type: none"> <li>* Tax validation</li> <li>* Premium/claims/document integration</li> <li>* Validation and workflow</li> <li>* CDR enrichment</li> </ul>

April 2024 testing will be extended as it includes the formal Vanguard output for the market

# Vanguard design engagement (extract from three-in-the-box)

	<p><b>In PI 11 we aim to...</b></p> <ul style="list-style-type: none"> <li>✓ Develop APIs and workflow for receiving and processing London Risk data (CDRs) from 3rd parties</li> <li>✓ Enhance data enrichment, enable improved risk assessment and reporting</li> <li>✓ Implement validations to comply with the CRP</li> <li>✓ Improve data accessibility and collaboration</li> <li>✓ Support the handling and versioning of changes to contracts</li> <li>✓ Enable downstream services like IPOS and ICOS to access validated risk data from the IROS Risk Store</li> </ul>		<p><b>PI 11 Epics</b></p> <ul style="list-style-type: none"> <li>• Expose Gateway REST API for secure ingestion of risk data. (Enhance for Prem &amp; Claims)</li> <li>• <b>Business Rule Validation - Execute Semantic Validation of A Fields (Enhance for Prem &amp; Claims)*</b></li> <li>• <b>Unique Reference</b></li> <li>• Endorsements</li> <li>• IPOS/ICOS integration</li> <li>• <b>Enable market participants to consume and ingest their CDR data from the data store*</b></li> <li>• <b>iMRC &amp; Associated Document Capture at point of bind / endorsement (Mandatory to complete the CDR)</b></li> <li>• Calculate FIL &amp; Risk Code Output fields</li> <li>• Written Premium Apportionment (Foundation)</li> <li>• Written Premium Apportionment</li> <li>• Basic validation - Validation against reference sets - 3rd Party ASG</li> <li>• <b>Basic validation - Conditional Validation checks - 3rd Party ASG</b></li> </ul>
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Below is an overview of provisional workshop plans and SME requests - we will share detailed agenda as soon as possible

Workshop Topic	Dates & Length	IUA	LMA	LIIBA	Vendor	We need SME's to
Business rules validation (#4 & #5)	1. w/c 14.08 2. w/c 11.09  Both for 90 mins	Suggest same SME group engaged in previous PIs on this topic. Additionally, members from Vanguard will also be invited as recommended by Ray Johnston. <b>No action required from associations as using group previously engaged, see next slide for proposed SMEs</b>			N/A	Confirm: <ul style="list-style-type: none"> <li>• When a rule should be executed</li> <li>• Which market association(s) should a rule be executed for</li> <li>• Approach to handling rule failure</li> <li>• Continue ongoing discussion that commenced in PI 10</li> </ul>



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