Blueprint Two

Get ready for the new digital services in July 2024

Phase one broker adoption checklist

Project and change management

Get ready for phase one:

☐ Identify all **stakeholders involved in the change** including leadership, executive team and users of existing portals and support messaging

☐ Provide **monthly progress updates to identified stakeholder groups** to reinforce the change benefits, and seek feedback

☐ **Develop an adoption change plan,** detailing the activities, owners and due dates

☐ **Identify** and **secure** the roles / people to deliver the plan

☐ **Estimate all costs** associated with digital phase one adoption

☐ Prepare a **budget allocation proposal** that outlines the budget breakdown for phase one digital services, present this to **project sponsors** and **stakeholders** for review and approval

Messaging

Get ready for phase one:

☐ Identify and **document any individuals who currently interact with messaging from Velonetic**

☐ **Identify and document** current processes that interact with and / or support existing messages

☐ **Review the final Blueprint Two technical specifications** once confirmed, to establish how messaging is changing when mapped against your existing messages

☐ Look out for **updates on any minor variances** to the published EDI messages

☐ **Find out if you currently use customised / transformed EDI messages** and want to continue doing so, and whether these will be supported from phase one go live, once confirmed by Velonetic

☐ Understand if you currently **hold the data required to populate the MRC v3**, if required

☐ Identify and work through **any data gaps or changes to processes / templates to populate the MRC v3**, if required

☐ If existing customised messages will no longer be supported, **work with your IT team and / or service provider to compare the structure**, format and content of existing messages against the new specifications

☐ **Establish the cost** and **resources** required to move to standard EDI equivalents for phase one go live

☐ **Document the changes required to the existing processes in your impact assessment tool** and change plan after establishing the changes that impact messaging

➡ ☐ If you need to **make updates** to your **messages / automated process / robotics technology,** work with your IT team / service provider to make the required updates

☐ **Identify all data that is collected** and how it is collected (i.e., whether it is manual or automated)

➡ ☐ For **manual data collection**; work with your IT team / service provider to update to the new file collection locations

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

Market gateway

Get ready for phase one:

☐ **Look out for updates on when you will be provided with new credentials and able to connect to the market gateway (ASG Adept)**, which will be ahead of customer testing to ensure firms are ready in time

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

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

New digital market services

Get ready for phase one:

☐ Understand **which portals / applications will no longer be available,** the functionality these portals / applications currently provide and what replaces them

☐ Identify and **document current processes that interact with or support these existing portals**

☐ Identify and **document the individuals who currently log onto the existing premium or claims portals / applications**

☐ **Identify** an **administrator who will create new users, secure log in credentials and manage new users / leavers** prior to go live

☐ Establish if your **internal systems interact with any of the portals / applications that will no longer be available**. **Document the changes** and inform your IT / service providers

➡ ☐ The IPOS & ICOS screens will not be available until March 2024. However, screenshots of the build will be **provided in advance to the market, to analyse and document any IT systems changes required**

☐ In the case that you need to make updates to your existing systems, **work with your IT team / service provider to make the required updates**

☐ **Document the changes required** to the existing portal / application processes and **update any user manuals and record these changes in your impact assessment tool and change plan**

☐ **Obtain log in credentials for the new IPOS and ICOS portals** once available from Velonetic

☐ **Review your own security specifications** and work with your IT team and / or service provider to **ensure that users can access the new portals**

☐ Upskill users who will be using the new digital market services by **ensuring they access the training materials available**

Reporting

Get ready for phase one:

☐ List the reports you currently receive and **document collection method, recipients and how the reports are used**

➡ ☐ **Distinguish which existing reports will or won't be used post go-live** and assign a report owner(s) for each report that will continue to be used

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

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

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

☐ In the case that you need to make updates to your existing systems, **work with your IT team / service provider to make the required updates**

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

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

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

Customer testing

Get ready for phase one:

- [ ] **Identify a test lead** who will be responsible for leading the testing efforts **and the individuals who will support with test execution**

- [ ] **Define the overall strategy and approach** for testing

- [ ] **Develop detailed test plans for testing the four core market processes** including test cases, scenarios, schedules and resource requirements

- [ ] Gain an understanding of the **detailed test process and how queries / defects are submitted to Velonetic via their online tool for resolution**

- [ ] **Deliver training sessions** for those who will be involved in testing

- [ ] Coordinate with your IT/DevOps teams or service provider to **allocate and set up test environments**

- [ ] Where possible, **prepare test data sets that cover various scenarios**, and **verify that all testing documents are complete**

- [ ] **Obtain log in details to the Velonetic test environments**

- [ ] Work with your IT/Dev Op team or service provider to **perform a readiness check** ensuring the test environment is set up

- [ ] In Q2 2024, your **IT/DevOps or service provider should be able to execute test cases and scenarios according to the established test plans**, which should cover the IPOS/ICOS portals, connection to the market gateway (ASG Adept) and messaging within the context of various market processes

- [ ] Utilise the online system to **log and report any identified defects or issues** and if required, perform regression testing after fixes and changes, to ensure the updates haven't introduced new issues

- [ ] **Keep stakeholders informed of testing progress, challenges and adjustments** and once the final test reports have been prepared, conduct a test completion meeting to obtain sign-off from your project sponsors / adoption lead