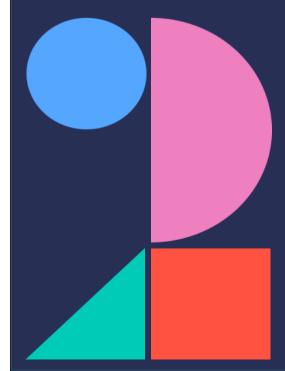


Get ready for the new digital services in July 2024

Phase one carrier adoption checklist

Project and change management

Identify all stakeholders involved in / impacted by 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, and present this to project sponsors and stakeholders for review and approval



Messaging



Ш	Identify and document any individuals who currently interact with / rely on messaging from Velonetic
	Identify and document current processes that interact with and / or support existing messages
	Review the final Blueprint Two technical specifications to ensure your carrier messaging and Write-Back messaging (if used) matches these specifications
	Look out for updates on any minor variances to the published EDI messages that may occur as the build continues
	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
	Establish the impact of any message data changes on existing automated processes / robotics technology and document any changes in your impact assessment tool and change plan
	Establish if you currently use customised messages and want to continue doing so (if they are supported from phase one go live, once confirmed by Velonetic), or wish to revert to standard EDI versions to avoid potential additional cost
	If they are not supported, work with your IT team and/or service provide to compare the structure, format and content of the published specifications
	Establish the cost and resources required to move to standard EDI equivalents for phase one go
	Document the changes required to the existing processes in your impact assessment tool and change plan after establishing the changes that impact messaging
L	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 whether it is collected manually or automatically
L	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 automatic collection from the new location

Market gateway

	crec	k out for updates for when you will be provided with new lentials and able to connect to the market gateway (ASG Adept will be ahead of customer testing to ensure firms are ready in time
L		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

	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
L	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
	Agree with relevant stakeholders in your organisation on whether you want to use Vitesse direct settlement, if so, please let your CRM contact know at onboarding that you wish to be enrolled
	Upskill users who will be using the new digital market services by ensuring they access the training materials available

Reporting

	List the reports you currently receive and document collection method, recipients and how the reports are used
L	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
I	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

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

