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Blueprint Two
Phase one digital services

Adoption guide for brokers & underwriters

Version 3, March 2024

How to use this guide

Purpose

- All firms will **need to use phase one digital services from a target launch date of October 2024 to continue trading in the market**.
- The guide provides a high-level overview of the **phase one processes the market will need to follow**, and the **functionality changes taking place** as we move away from current portals.
- It also sets out the **activities to be undertaken** (organised by people, process & technology) to **get ready to adopt phase one digital services** from the target launch date of October 2024.
- The guide also provides resources to **facilitate workshops** with individuals who are **sponsoring, driving, and impacted by the change**.

Version updates

- This version of the guide builds on version one shared in September 2023. It contains all information provided in the previous edition, and includes further updates provided at the market session held on 25 September 2023.*
- The changes aim to improve the document's usability, and add detail to the recommended practical activities:
  1. **Broker and carrier pathways**, covering open market and delegated authority (DA) messaging with Velonetic
  2. **Portal / application sub-services regrouped by application name**
  3. **Activities section has been expanded**, **tailored** for market firm types, and consolidated into an **example adoption timeline**

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.

Reading time. By following the broker or carrier sections of the guide, it will **typically take around 45 minutes to read**.

Interactive design. The guide is **interactive** (e.g. sections tailored to brokers / carriers). **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.

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.

* The programme follows an agile approach, making this publication a momentary snapshot in time. As such, not all details are available, and some design decisions remain pending. Information will continue to evolve over time, with updates shared as and when available.

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How to navigate this document

This adoption guide is designed to be interactive, allowing the reader to focus on what is relevant for them and making it easier to digest and action. The contents page is interactive. Click on the *"Section"* that is relevant for you, and return to this contents page by clicking on the icon.

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01

Phased delivery: overview and timeline

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 phase one delivery work?

Phase one: from a target launch date of October 2024

All firms will need to use phase one digital services from October 2024 (target launch) 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: available from April 2025

Once phase one services have been adopted, phase two provides the **complete set of services that fully utilise the new digital processing platform**, enabling **data-first interactions between brokers and carriers** that supports risk, premium and claims agreements within the London market. Following phase one adoption, market firms can choose when to move to phase two digital services, subject to a final cutover date which is yet to be confirmed.

	Available in phase one (Target launch date of October 2024)	Available in phase two (April 2025)
Receive and send Electronic Data Interchange (EDI) messages in existing formats	✓	✓
Access to a new digital processing services, replacing existing portals – transacting via International Premiums Orchestration Service (IPOS) and International Claims Orchestration Service (ICOS) portals *	✓	✓
MRC v3 (Market Reform Contract version 3) submission **	✓	✓
Core Data Record (CDR) created to support digital processing	-	✓
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 and on to the market gateway (ASG Adept) from phase two.*

Timeline: phase one digital services

2023

2023

- Firms identify and action early adoption activities
- Vanguard testing starts

2024

Jan 2024

- Firms continue to progress readiness and adoption activities
- Vanguard testing continues

March 2024

- London market premium and claims service built and ready to deploy for testing
- London market DA premium and claims built and ready to deploy for testing

User training starts

April 2024

- Market testing available for London market and delegated authority premium and claims services

End of June 2024

- London market open market premium and claims live and ready for launch
- London market delegated authority premium and claims live and ready for launch
- Market testing **complete for phase one**

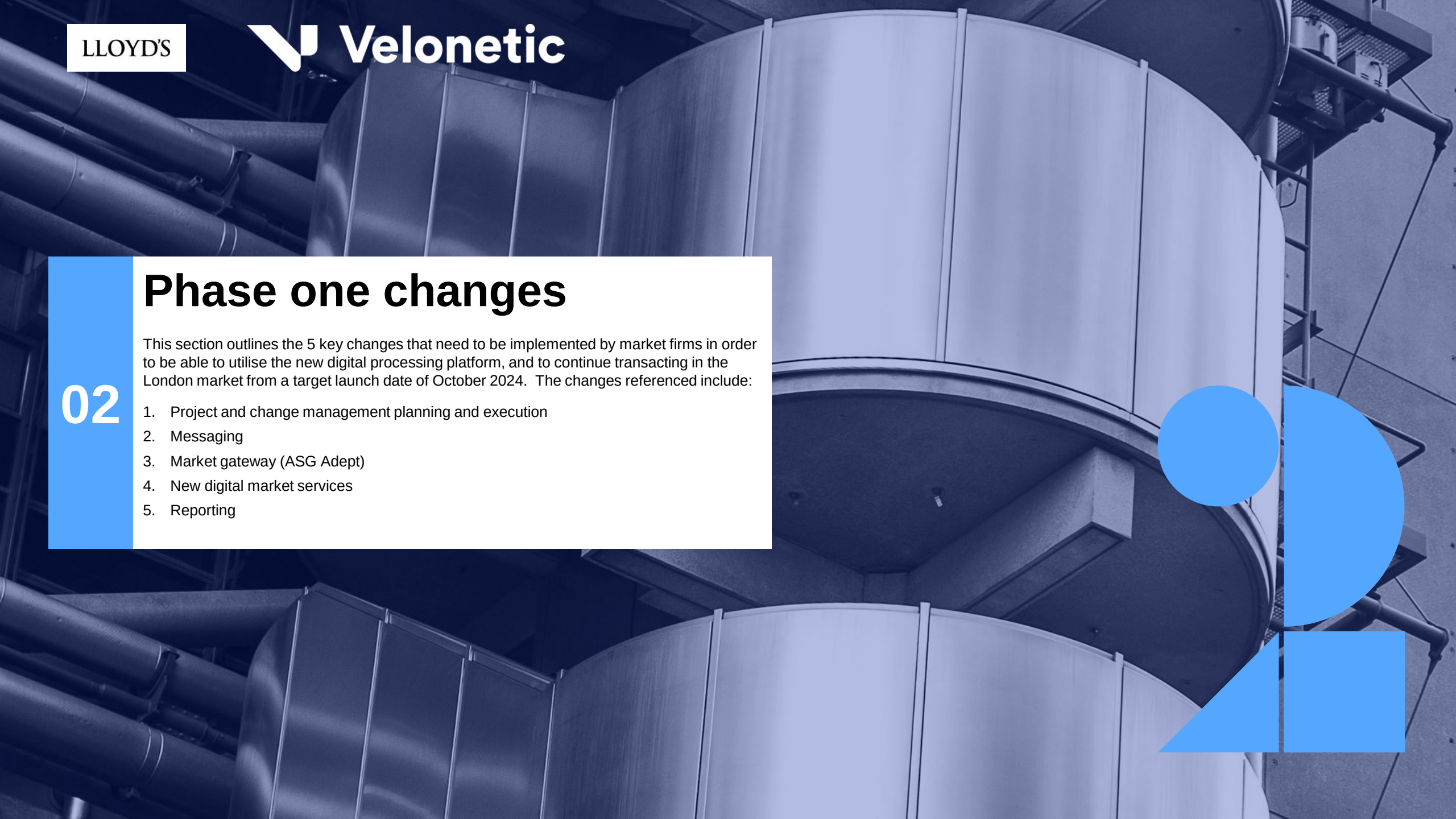
October 2024 (Target launch)

- Cutover from heritage services
- **Phase one digital services launch**

September 2023 onwards

MRC v3 adoption and CDR creation

- Phase one services are available from a target launch date of October 2024
- Phase two full digital functionality will be available from April 2025



02

Phase one changes

This section outlines the 5 key changes that need to be implemented by market firms in order to be able to utilise the new digital processing platform, and to continue transacting in the London market from a target launch date of October 2024. 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 phase one changes

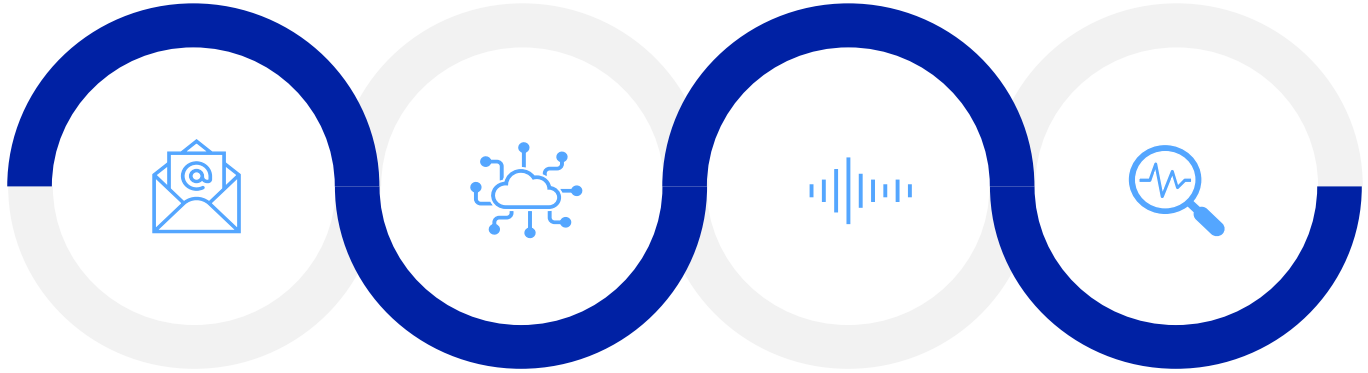
1 Project and change management planning and execution

2 Messaging

- Change is not expected to the structure, format or data content of standard EDI messages in digital phase one
- There is potential impact to customised / transformed messages

3 Market gateway (ASG Adept)

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



4 New digital market services

- Market firms will have access to new digital processing services IPOS and ICOS, replacing existing portals
- Previous market portals and applications will not be available from cutover
- Introduction of a direct settlement functionality via Vitesse

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 portals enable faster processing of premiums and claims, and provide more intuitive portals.
- Use of the ICOS portal allows the ability to update reserves in real-time, resulting in more accurate reserving.
- Faster query management can be achieved by moving to real-time rather than overnight processes.
- Introduction of the direct settlement facility via Vitesse, provides the possibility for faster payments to multiple third parties in multiple currencies.
- Reporting via a self-serve approach allows users to download reports from Qlik Sense in Excel / CSV / PDF.
- Reports delivered in days rather than weeks, enabling faster access to information.

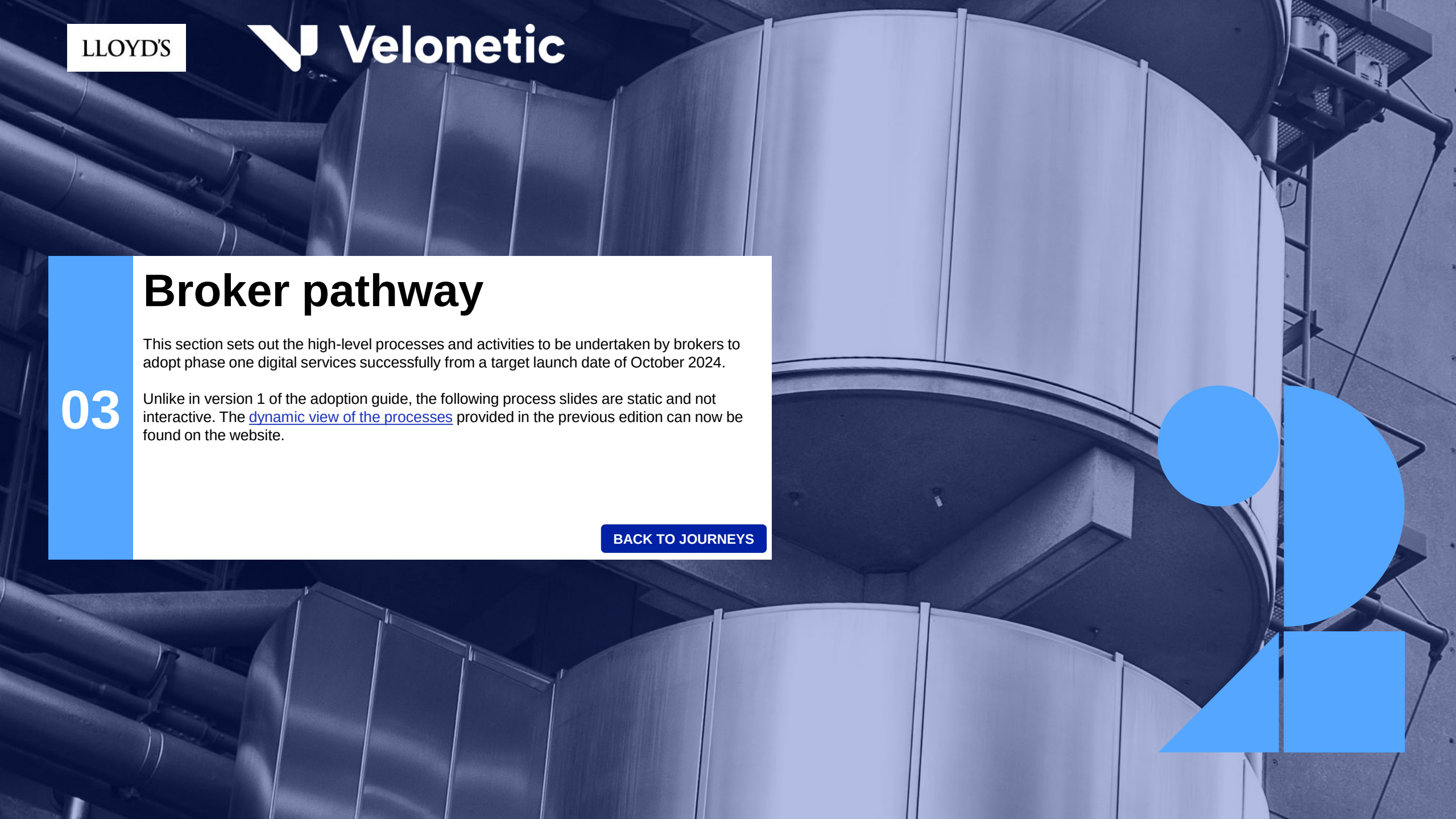
Introduction to broker and carrier pathways

This version of the adoption guide includes information split by brokers and carriers, with a pathway dedicated to each*. The portals and applications are set out in a separate section as they are common to both parties.

Click on the section relevant to you to focus on how the processes are changing from your firm's perspective, and what actions you need to be taking now.

Market firm type	Broker	Carrier
	All brokers *will need to use* ***phase one digital services from a target launch date of October 2024*** *to continue trading in the London market.*	***All Lloyd's and company market carriers*** *will need to use* ***phase one digital services from a target launch date of October 2024*** *to continue trading in the London market.*
Specific sections	***Broker processes*** ***Broker activities*** ***Broker EDI specs*** ***Portals***	***Carrier processes*** ***Carrier activities*** ***Carrier EDI specs*** ***Portals***

* *The adoption guide is not intended for MGAs at this stage, unless MGAs have a broking function.*



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Broker pathway

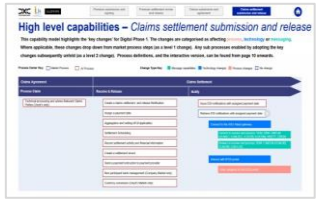
This section sets out the high-level processes and activities to be undertaken by brokers to adopt phase one digital services successfully from a target launch date of October 2024.

Unlike in version 1 of the adoption guide, the following process slides are static and not interactive. The dynamic view of the processes provided in the previous edition can now be found on the website.

BACK TO JOURNEYS

Introduction to broker-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 LPAN (London Premium Advice Note) either via DRI (Document Repository Interoperability) or IMR (Insurers' Market Repository) portal. Submissions may be accompanied by a MRC v3 (Market Reform Contract v3), 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 SND (Signing Number and Date) 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 the IPOS (International Premium Orchestration Service) portal 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 a LIMCLM (London Insurance Market Claims Messages) and supporting documents via DRI or ICOS (International Claims Orchestration Service) portal. Submissions will include a UCR (Unique Claim Reference) and UMR (Unique Market Reference). The data will be validated 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 processing processes show how the market can triage the claims, send to the carriers to 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 a payment date and forwarded onto the settlement service.

Changes to the broker premium submission & signing process

Summary of changes for brokers

Brokers can continue to submit the premium submissions via LPANs as they do today, either via the IMR portal or via DRI. However should they wish to continue to use DRI, they will need to connect to the market gateway (ASG Adept). Queries are now managed in the IPOS portal, and hence brokers must connect to the IPOS portal to be able to view and respond to queries. All brokers will need to connect to the market gateway (ASG Adept) to be able to retrieve EDI messages. In addition, brokers will need to ensure that the format, structure and content of their EDIs have not changed. The IMR portal is still available to view submissions and associated documents in the same way as it is today.

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

Premium submission and signing | Premium settlement review & release | Claims submissions & agreement | Claims settlement & release

Create & submit	Receive & validate	Process & store	Notify
Log in to the IMR portal	Ingest premium submission	Log in to the IMR portal	Log in to the IMR portal
Send premium submission via the IMR portal	Validate the submission against the MRC v3 and supporting documents	View submissions and documents in the IMR portal	View submissions and documents in the IMR portal
Upload documents to the IMR	Retrieve MRC v3	Process premium submission	Issue EDI notifications
Create a premium submission via DRI (cash or delinked)	Log, compile and provide errors	Process non-fundamental splits	Retrieve EDI notifications
Connect to the market gateway (ASG Adept)	Store premium submission	Log, compile and provide errors	Connect to the market gateway (ASG Adept)
Submit LPAN original premium submission		Manage and resolve queries	Brokers to receive and process (cash LPAN) BSM, BSM (SIGNIN)
Submit LPAN FDO premium submission		Respond to queries	Brokers to receive and process (de-linked) IPCBSM
Submit LPAN additional premium		Interact with IPOS portal	
Submit LPAN return premium		View and respond to queries in the portal	
Submit LPAN Nil premium amendment		Update premium submission record	
Upload documents to the IMR via DRI			

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

Process owner key: Velonetic process, Broker process - No change, Broker process - Change required

Changes to the broker premium settlement review & release process

Summary of changes for brokers

Brokers will need to make a connection to the market gateway (ASG Adept) in order to send RESETT messages (when submitting a premium settlement release notification), to retrieve REDIAL validation messages and to receive and process BSM and BSM (SIGNIN) messages. Brokers should also connect to the IPOS portal to send the pre settlement release notifications. All brokers will need to connect to the market gateway (ASG Adept) to be able to retrieve EDI messages. In addition, brokers will need to ensure that the format, structure and content of their EDIs have not changed. Queries are now managed in the IPOS portal, and hence brokers must connect to the IPOS portal to be able to view and respond to queries on their RESETT and release messages.

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

Premium submission and signing → **Premium settlement review & release** → Claims submissions & agreement → Claims settlement & release

Create & submit	Receive & validate	Process & store	Notify
Create a premium settlement release notification	Ingest RESETT message and validate premium submission against the delinked LPAN	Process premium settlement review and release and assign a payment date	Issue EDI notifications
Connect to the market gateway (ASG Adept)	Ingest the portal release and retrieve LPAN	Log, compile and provide errors	Retrieve EDI notifications
Submit RESETT message	validate against the delinked LPAN for portal submission	Manage and resolve queries	Connect to the market gateway (ASG Adept)
Connect to the IPOS portal	Log, compile and provide errors	Respond to queries	Brokers to receive and process BSM, BSM (SIGNIN)
Submit the pre settlement release notification via IPOS portal	Issue EDI notifications	Interact with IPOS portal	
	Retrieve EDI notifications	View and respond to queries in the portal	
	Connect to the market gateway (ASG Adept)	Update premium records	
	Retrieve REDIAL message		
	Store premium submission		

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

Process owner key: Velonetic process; Broker process - No change; Broker process - Change required

Changes to the broker claims submissions & agreement process

Summary of changes for brokers

Brokers can continue log into the IMR portal to view the status of a claim and associated documents as they do today. However, brokers will need to make a connection to the market gateway (ASG Adept) in order to submit LIMCLMs, to receive and ingest LIMRES responses and to receive and process LIMCLM messages (CLMLRB, CLMILB, CLMLLB). Brokers can choose to connect to the ICOS portal to enter claims submissions and receive portal notifications, but must connect to the ICOS portal to respond to queries. In addition, brokers will need to ensure that the format, structure and content of their EDI messages have not changed.

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

Premium submission and signing → Premium settlement review & release → **Claims submissions & agreement** → Claims settlement & release

Create & submit	Receive & validate	Claims decision
Connect to the IMR portal	Ingest all claims submissions and technically validate	Route to relevant claim parties for agreement or denial
Upload documents into the IMR	Ingest the portal submission	Receive claim decision (agreement, query or denial)
Create a LIMCLM claims submission	Retrieve MRC v3 / premium paid status, claims history	Manage and orchestrate queries
Connect to the market gateway (ASG Adept)	Validate claim against the MRC v3, claims history and premium records	*Raise and respond to queries
Submit a LIMCLM FNOL	Issue acknowledgements	Interact with the ICOS portal
Submit a LIMCLM subsequent claims advice	Receive acknowledgements	View and action queries in the portal
Interact with the ICOS portal	Interact with the ICOS portal	Issue EDI notifications
Enter claims submission through ICOS portal	Receive portal notifications	Retrieve EDI notifications
	View submissions in the portal	Connect to the market gateway (ASG Adept)
	Issue EDI notifications	Brokers to receive & process: LIMCLM (CLMLRB, CLMILB, CLM LLB)
	Retrieve EDI notifications	
	Connect to the market gateway (ASG Adept)	
	Receive and ingest a LIMRES	

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

Process owner key: Velonetic process; Broker process - No change; Broker process - Change required

NB * Only carriers are able to raise queries

Changes to the broker claims settlement & release process

Summary of changes for brokers

Brokers are not involved in processing claims or scheduling settlements, as these activities are undertaken by Velonetic. In order to continue receiving EDI notifications with assigned payment date (e.g. CLMLRB, CLMLLB), brokers will need to connect to the market gateway (ASG Adept). Brokers can log into the ICOS portal to be able to view progress on these notifications.

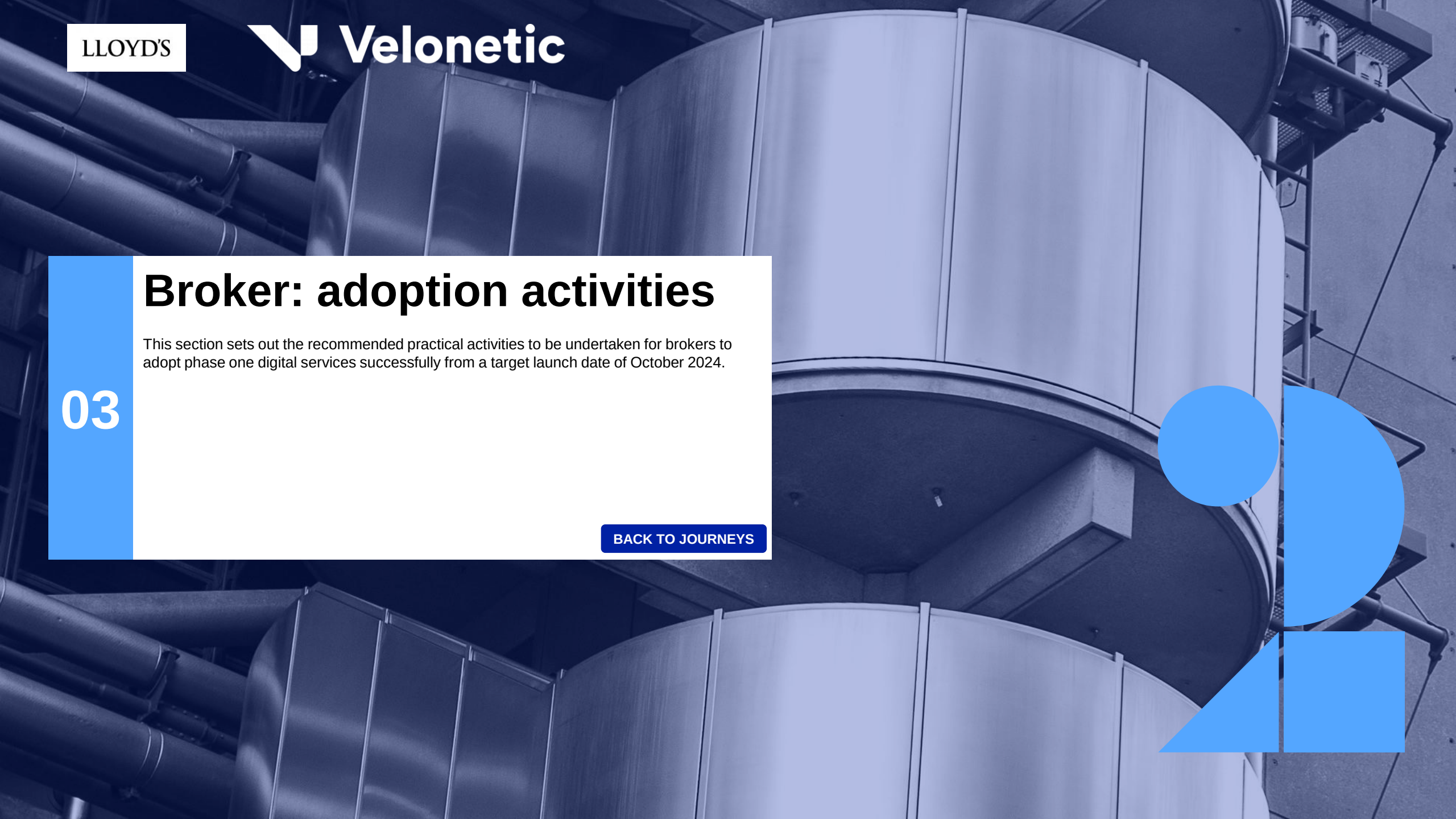
Details of activities required to adopt these new ways are working are shown the activities section of this guide

Premium submission and signing → Premium settlement review & release → Claims submissions & agreement → **Claims settlement & release**

Process claim	Receive & release	Notify
Technical processing and advise Relevant Claims Parties (Lloyd's only)	Create a claims settlement and release notification	Issue EDI notifications with assigned payment date
	Assign a payment date	Retrieve EDI notifications with assigned payment date
	Aggregation and netting off (if applicable)	Connect to the market gateway (ASG Adept)
	Settlement scheduling	Brokers to receive and process: BSM / LIMCLM (CLMLRB, CLMLRB, CLM LLB)
	Record settlement activity and financial information	
	Create a settlement record	Log into the ICOS portal
	Send a payment instruction to payment provider	Receive notifications
	Non participant bank management (company market only)	Interact with ICOS portal
	Currency conversion (Lloyd's Market only)	View progress in the ICOS portal

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

Process owner key: Velonetic process; Broker process - No change; Broker process - Change required



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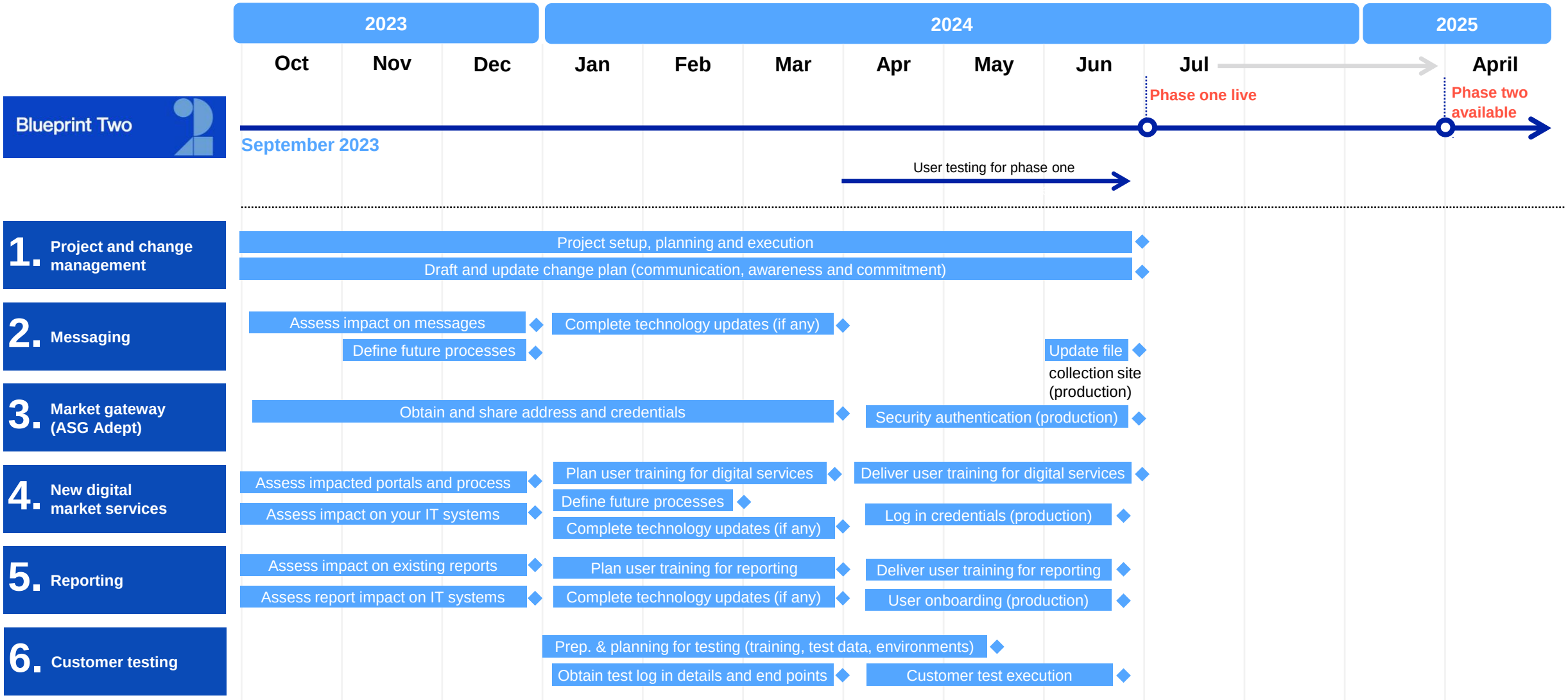
Broker: adoption activities

This section sets out the recommended practical activities to be undertaken for brokers to adopt phase one digital services successfully from a target launch date of October 2024.

BACK TO JOURNEYS

Broker timeline: phase one digital services



Timelines have not yet been updated following the 28 March announcement of a change to the date of phase one cutover.

Broker adoption activities: project and change management

Summary of the change

- To enable effective preparation and adoption of digital phase one services it is recommended that a specific project is mobilised within your firm.
- This project should have a nominated sponsor, dedicated resourcing and an agreed budget.

Additional information

— All firms will need to use phase one digital services from the target date of October 2024 to continue trading in the market. This set of digital services will utilise the new digital processing platform, with minimal impact to brokers and carriers.

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Awareness, commitment & communication	— 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. *A stakeholder analysis template is available to support this activity*.	— This stakeholder list will identify all individuals to be involved in or regularly informed of Blueprint Two readiness and adoption progress.	Q3 2023	✓		
	— Provide monthly progress updates to identified stakeholder groups to reinforce the change benefits, and seek feedback / questions. *Benefits are highlighted in the Benefits Framework on the Blueprint Two website*.	— Regular communications will enhance commitment and buy-in from those impacted by the change.	Ongoing	✓		
Plan and resourcing	♦ Develop an adoption change plan, detailing the activities, owners and due dates.	— A plan with sufficient level of detail to manage and track adoption activities to achieve the October target go-live.	Q3 2023		✓	
	♦ Identify and secure the roles / people to deliver the plan (and feel free to run it by your engagement partner if helpful).	— A project team in place to achieve delivery of the October target go-live.	Q3 2023	✓		
Budgeting	♦ Estimate all costs 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.). ♦ Prepare a budget allocation proposal that outlines the budget breakdown for Blueprint Two phase one digital services, and present this to project sponsors and stakeholders for review and approval.	— Validated budget allocation proposal (BP2 business case).	Q3 2023	✓		

♦ **Updated activity**

Broker adoption activities: messaging (1 of 2)

Summary of the change

- **Change is not expected to the structure, format or data content of standard EDI messages** in digital phase one
- The programme is being run on an agile basis so there remains a slight risk that specifications for standard EDIs may need to be altered to align with the build of the digital processing services. **Any changes will be minor, and you will be notified as soon as possible.**
- **All messages will go to and from the market gateway** (ASG Adept), rather than the existing XAG / XDH / XSH Gateways.
- **Certain EDI customisations may not be supported in the future.**

Additional information

- We recognise that even if one single data field changes, it may have a knock-on impact on straight through processing or require assessment of existing systems to understand if changes are required.
- As sequence numbers are needed for the mainframe but not for digital services, the field will still be included to avoid disrupting the message content, but will be reset to zero from cutover.
- The broker EDI technical specifications can be found in this section. Market firms and vendors can use these to consume the new EDI messages.

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on standard messages (if any)	— Identify and document any individuals who currently interact with / rely on messaging from the Velonetic. *The stakeholder analysis tool is available to support this activity.*	— This 'messaging stakeholder' list will ensure a full understanding of who will be impacted, so they can be prepared for the change.	Q3 2023	✓		
	— Identify and document current processes that interact with and / or support existing messages. *(e.g. submitting an LPAN via the IMR portal)*	— These 'as is' processes will provide a basis for assessing the impact of the change and inform any testing that may be required.	Q3 2023		✓	
	— Review the published Blueprint Two technical specifications to ensure your broker messaging matches those specifications. (e.g. BSM, IPCBSM)	— This impact assessment will provide a basis for adapting 'as is' processes that interact with / rely on messaging.	Q3 2023		✓	
	♦ Look out for updates on any minor variances to the published EDI messages that may occur as the build continues. These will be published and your engagement partner will be aware if and when they are confirmed.	— This will ensure that you continue to work with the latest version of all EDI messages.	Q4 2023		✓	
	— Establish the impact of any message data 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?	— This will help ensure that there is no interruption to existing messaging processes after phase one go live.	Q4 2023			✓

♦ **Updated activity**

Broker adoption activities: messaging (2 of 2)

Adoption activities (continued):

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on customised messages (if you have any)	— Establish if you currently use customised / transformed EDI messages. Your engagement partner will be able to help you determine if you have customised messaging.	— This will inform whether you need to decide a go forward approach for customised / transformed EDI messages.	Q3 2023		✓	
	♦ Decide if you wish to continue using customised messages, if available, or wish to revert to standard EDI versions to avoid potential additional cost. ♦ **Note**: Velonetic will confirm which customisations will be taken forward and at what cost in Q4 2023. Only widely used customisations are likely to be supported. You should plan to move away from bespoke renames or conversions now.	— This will enable you to understand the resources and cost of moving away from customised messaging now, and understand if there is an opportunity to continue using your customised messages and at what cost later, once published by Velonetic.	Q4 2023		✓	
	— If your existing customised messages will no longer be supported, or you no longer need them, work with your IT team and / or service provider to compare the structure, format and content of the published specifications against your customised messages. ♦ Feed this into your change plan and establish the cost and resources required to move to standard EDI equivalents for phase one go live.	— This detailed analysis will help establish the scale and cost of the change for your business.	Q4 2023		✓	
Define 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. *The change impact assessment tool and change plan templates are available to support this activity.*	— These will be the 'to be' processes to be adopted in readiness for phase one go-live.	Q4 2023		✓	
Make technology updates	— In the case that you need to make updates to your messages / automated process / robotics technology 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.	Q1 2024			✓
Changes to the file collection locations	— 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. ○ In the case of manual data collection work with your IT team / service provider to update to the new file collection locations once confirmed by the Velonetic. ○ 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 location.	— This will ensure that data file collection can continue.	Q2 2024			✓

♦ **Updated activity**

Broker adoption activities: market gateway (ASG Adept)

Summary of the change

- Requirement to connect to the market gateway **(ASG Adept) for all messaging**, rather than the existing XAG / XDH / XSH Gateways.
- A **number of technology changes need to be implemented and tested** to ensure connectivity from the target date of October 2024. For example:
  1. The messaging origination point will change
  2. The SFTP location will change
  3. The security model will change requiring a new set of user profiles

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.
- More details on how to interface with the Velonetic Digital Processing Services will be provided in good time to enable testing from April 2024.
- Ahead of testing you, or your service provider, will be provided with a new IP address or URL, along with a username and password and any other credentials necessary.

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
New end point address and credentials	♦ Look out for updates on when you will be provided with new credentials and be able to connect to the market gateway (ASG Adept). This will be ahead of customer testing to ensure firms are ready in time.	— This will enable of the connection to the market gateway (ASG Adept).	Q1 2024			✓
	— Share the credentials with your IT team or service provider, who are responsible for reconfiguring your systems and testing the new gateway.	— This will provide the relevant technology team with the information required to make any relevant changes.	Q2 2024			✓
New security authentication process	— Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one go-live. *Refer to the ASG Adept website to access the integration user guide.* ♦ **Note**: 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. **Note:** this information may not be available until Q1 2024.	— This will enable users to login after phase one go-live.	Q2 2024			✓

♦ **Updated activity**

Broker adoption activities: new digital market services (1 of 2)

Summary of the change

- Market firms will have **access to a new digital processing services** (International Premium and Claims Orchestration Services), **replacing existing portals**
- **The current functionality contained in the existing portals / applications,** such as LIDS, CLASS and ECF (XIS, XCS), **will be transferred to the new portals** (IPOS / ICOS)
- **Existing portals and applications will not be available from cutover from the target date of October 2024**

Additional information

- New portals (IPOS and ICOS) are being introduced to help process premium accounting and settlement and claims workflow and settlement respectively for open market and delegated authority risks.
- Velonetic technicians will process and settle transactions using the new digital processing services.
- Visuals of the new IPOS / ICOS portal screens will be shared once available

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on the portals you use today	— Understand which portals / applications will no longer be available, the functionality they currently provide and what replaces them. *Use the portals / applications section of this guide to complete this activity*.	— This analysis between the existing and new portals will establish the scale of the change for your business.	Q4 2023		✓	
	— Identify and document current processes that interact with or support these existing portals. *The portals / apps Excel tracker is available to help you kick off this activity*.	— These 'as is' processes will provide a basis for assessing the impact of the change.	Q4 2023		✓	
Identify impacted users	— Identify and document the individuals who currently log onto the existing premium or claims portals / applications.	— This user list will inform adoption activities such as creation of login credentials and identification of training needs.	Q4 2023	✓		
	♦ Identify an administrator who will create new users, secure log in credentials and manage new future users / leavers for onboarding and testing prior to go live. — **Note:** A single login credential will be used for both IPOS/ICOS and Qlik Sense	— This will ensure you have somebody responsible for obtaining log in credentials that can be tested ahead of go live and to manage future users.	Q4 2023	✓		

♦ **Updated activity**

Broker adoption activities: new digital market services (2 of 2)

Adoption activities (continued):

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on existing IT processes and internal IT systems	— Establish if your internal systems interact with any of the portals / applications that will no longer be available. Document these changes and inform your IT team / service providers.	— 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.	Q4 2023		✓	✓
	— The IPOS & ICOS screens as a whole package will not be available until March 2024. However, as they are built, screen shots will be provided to the market to analyse and document any IT systems changes required. Capture changes in your change plan. *A change plan template is available to support this activity.*	— This will enable you to track the changes required ahead of phase one go live.	Q1 2024		✓	
	— 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 portals.	— This will ensure that interaction can continue with the new portals.	Q1 2024			✓
Define future processes	— Document the changes required to the existing portal / application processes and update any user manuals. *This can be recorded in a change impact assessment tool (a template is available to support this activity) and should form part of your change plan (a template is available to support this activity).*	— This activity will help define your 'to be' processes.	Q1 2024		✓	
Log in credentials and security specifications	♦ Obtain log in credential for the new IPOS and ICOS portals once available from Velonetic.	— This will ensure your 'portal users' have log in credentials that can be tested ahead of go live.	Q2 2024	✓		
	— Review your own security specifications and work with your IT team and / or service provider to ensure that users can access the new portals (e.g. is chrome installed etc).	— This will ensure the environment is compliant with your internal security requirements.	Q2 2024			✓
User training	♦ Upskill users who will be using the new digital market services by ensuring they access the training materials available.	— This will ensure users are able capable of using the new digital market services from go-live.	Q2 2024	✓		

♦ **Updated activity**

Broker adoption activities: reporting (1 of 2)

Summary of the change

- A **self-serve approach will be introduced to reporting** with a**ll existing reports being available** in the new digital services, including bespoke reports.
- Functionality from **existing reporting portals / apps** (e.g., Brio, Infoview) will be **replaced by the Qlik Sense reporting tool**. Qlik Sense is a web-based application, allowing users to view reports online. All reports are **downloadable from Qlik Sense in excel / CSV / PDF**. The data will be **extracted straight from IPOS / ICOS** so all **data will be the same format (no bespoking).**
- A number of **people, process and technology changes** need to be implemented to **ensure relevant reports will be received from phase one go live.**

Additional information

- Reporting will be via a directly form the online service. Reports self-serve pull capability, allowing users to download reports will no longer be emailed to market firms
- Consideration is being given to how to automate the sending of reporting from Qlik Sense, which may initially include a download to an SFTP site as a starting point.
- All existing reports (standard or bespoke) will be available in Qlik Sense, based on the fields and data that are available today. The flexibility of Qlik Sense means that additional new reports can be set up.
- Reports can be scheduled to be available on a specific date.
- Data will be updated daily via an overnight process.

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on existing reports and associated processes	♦ Create a list of the reports you currently receive and document how they are collected, who the recipients are and how they are used. — **Note:** Velonetic is investigating whether it can share details with each participant as to what reports they receive today. This is expected to be confirmed in Q4 2023.	— Provides a baseline from where to assess the impact.	Q4 2023		✓	
	♦ Based on your report list, categorise which existing reports will continue to be used post go-live and any reports that are no longer required. Assign a report owner(s) for each report that will continue to be used.	— Ensures redundant reports are not recreated, saving unnecessary effort.	Q4 2023		✓	
	— Identify where these reports are currently sent to or collected from, and define how this process will be updated post go-live when emailing of reports will be replaced by self-service reporting.	— Ensures that recipients will continue to be able to receive or to access the reports they need.	Q4 2023		✓	

♦ **Updated activity**

Broker adoption activities: reporting (2 of 2)

Adoption activities (continued):

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Impact on existing reporting IT processes and internal IT systems	♦ Understand whether there is an automated process that feeds report data into other databases, as you may need to pull the raw data in different way to continue that process. ○ In the short-term, it is likely that reporting data will 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 MI team, to agree the best solution. ○ The longer-term solution is to send report data via an API, but this will not exist as from phase 1 go-live.	— This will ensure that data can still be fed from reports into other databases from phase one go-live.	Q4 2023			✓
	— Assess and define any changes that will need to be made to existing systems when replaced by self-service reporting.	— Documenting any technology changes will ensure you are on track to connect to the reporting tool once phase one goes live	Q4 2023			✓
	♦ 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.	— This will ensure that reporting can continue with the new digital services.	Q1 2024			✓
User onboarding for reporting	♦ 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. ♦ **Note**: User set-up in the Qlik Sense tool is expected to commence in Q1 2024. It is anticipated that customers will not require a separate log on. Once you have an ICOS / IPOS log in then you can log into Qlik Sense as it is part of a single domain.	— This user list will inform adoption activities such as creation of login credentials and identification of training needs.	Q1 2024	✓		
User training for reporting	♦ Provide reporting owners with upskilling by reading the Qlik Sense training pack once available from Velonetic.	— Provide support to the reporting owners who will use Qlik Sense.	Q2 2024	✓		
	♦ There will be some rationalisation of language for reporting (e.g. Claim number, ID, reference), so look out for details of these changes from Velonetic in Q2 2024.	— This terms / descriptions dictionary will help report users to navigate any rationalisation of language	Q2 2024	✓		

♦ **Updated activity**

Broker adoption activities: customer testing (1 of 2)

Summary of the change

- We already have some market firms involved in early testing and the learning from that will help shape the **market-wide testing that will begin in April 2024.**
- Testing scope and methodology are dependent on the **customer testing model,** which will be **communicated in the December market event.**
- **Service providers will need to test the digital services** for their clients and access will be made available to them for the testing period.
- **New portals**, the **Qlik Sense tool** and any **updates to messaging** processes will all need to be tested prior to cutover.

Additional information

- Market firms will need to sign a new Digital Processing Services Agreement (DPSA) ahead of phase one go live. This should be ready to view in January 2024. It will replace the current service agreement called FERN2.
- Every user will require log in details to access the new services and these will need to be maintained by each market firm for new joiners and leavers.
- Access to the new portals will need to be confirmed and tested

Adoption activities:

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Preparation and planning for testing	Identify a test lead who will be responsible for leading the testing efforts and the individuals who will support with test execution.	This list of testing team members will give clarity on who is involved in testing and allow them to plan for this.	Q4 2023	✓		
	♦ Define the overall strategy and approach for testing. **Note**: Testing scope and methodology are dependent on the customer testing model, which will be communicated in the December market event.	This will ensure testing goals, scope, and methodologies are agreed upfront.	Q1 2024		✓	
	♦ Develop detailed test plans for testing the four core market processes. Your test plan should include test cases, scenarios, schedules and resource requirements.	This will ensure your testing team members are	Q1 2024		✓	
	♦ Gain an understanding of the detailed test process and how queries / defects are submitted to Velonetic via their online tool for resolution. Details of the testing approach are expected to be shared in December 2023.	This will ensure that testing can be proactively managed, and any issues tracked to resolution.	Q1 2024			✓
	♦ Deliver training sessions for those who will be involved in testing.	To ensure testers are familiar with the testing approach and tools	Q1 2024	✓		

♦ **Updated activity**

Broker adoption activities: customer testing (2 of 2)

Adoption activities (continued):

Topic	Broker activity	Target outcome	Target date	People	Process	Tech
Test data and environment setup	♦ Coordinate with your IT/DevOps teams or service provider to allocate and set up test environments.	— This will ensure that testing environments are ready and available for Q2 2024	Q1 2024			✓
	♦ Where possible, prepare test data sets that cover various scenarios, and verify that all testing documents are complete (test plans, test cases, any other relevant docs)	— This will ensure that necessary test data is available for testing, and that all testing documents are up to date	Q1 2024		✓	
Test log in details	♦ Obtain log in details to the Velonetic test environments, e.g. file collection site, market gateway (ASG Adept) and portal log in details.	— This will ensure access to the test environments.	Q1 2024	✓		
Test execution and tracking	♦ Work with your IT/Dev Ops team or service provider to perform a readiness check to ensure the test environments are set up as planned	— This will help verify that the test environments are correctly configured to be able to start testing promptly	Q1 2024			✓
	♦ In Q2 2024, your IT/DevOps team or service provider should be able to begin executing test cases and scenarios according to the established test plans. Your testing should cover the IPOS/ICOS portals, connection to the market gateway (ASG Adept) and messaging. These items should be tested in the context of various market processes: ♦ Premium submission and signing ♦ Premium settlement review and release ♦ Claims submissions and agreement ♦ Claims settlement submission and release ♦ Test that users can access Qlik Sense for reporting requirements, and that report automation (if required) is working ahead of phase one go live	— Following a structured approach will ensure a smoother and more organised testing phase.	Q2 2024			✓
	♦ Utilise the online system to log and report any identified defects or issues ♦ If required, perform regression testing after fixes and changes, to ensure this hasn't introduced new issues	— Monitoring and reporting defects will enable issues to be resolved ahead of phase one go-live	Q2 2024			✓
	♦ Through regular review meetings, keep stakeholders informed of testing progress, challenges and adjustments. Once the final test reports have been prepared, conduct a test completion meeting to obtain sign-off from your project sponsors / adoption lead	— Ensures stakeholders are kept informed of testing progress	Q2 2024	✓		

♦ Updated activity

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Broker: messaging specifications

03

This section sets out the EDI messaging specifications for brokers. Brokers will need to review this section to ensure that the format, structure and content of their EDIs have not changed.

BACK TO JOURNEYS

Broker EDI messaging specifications (1 of 3)

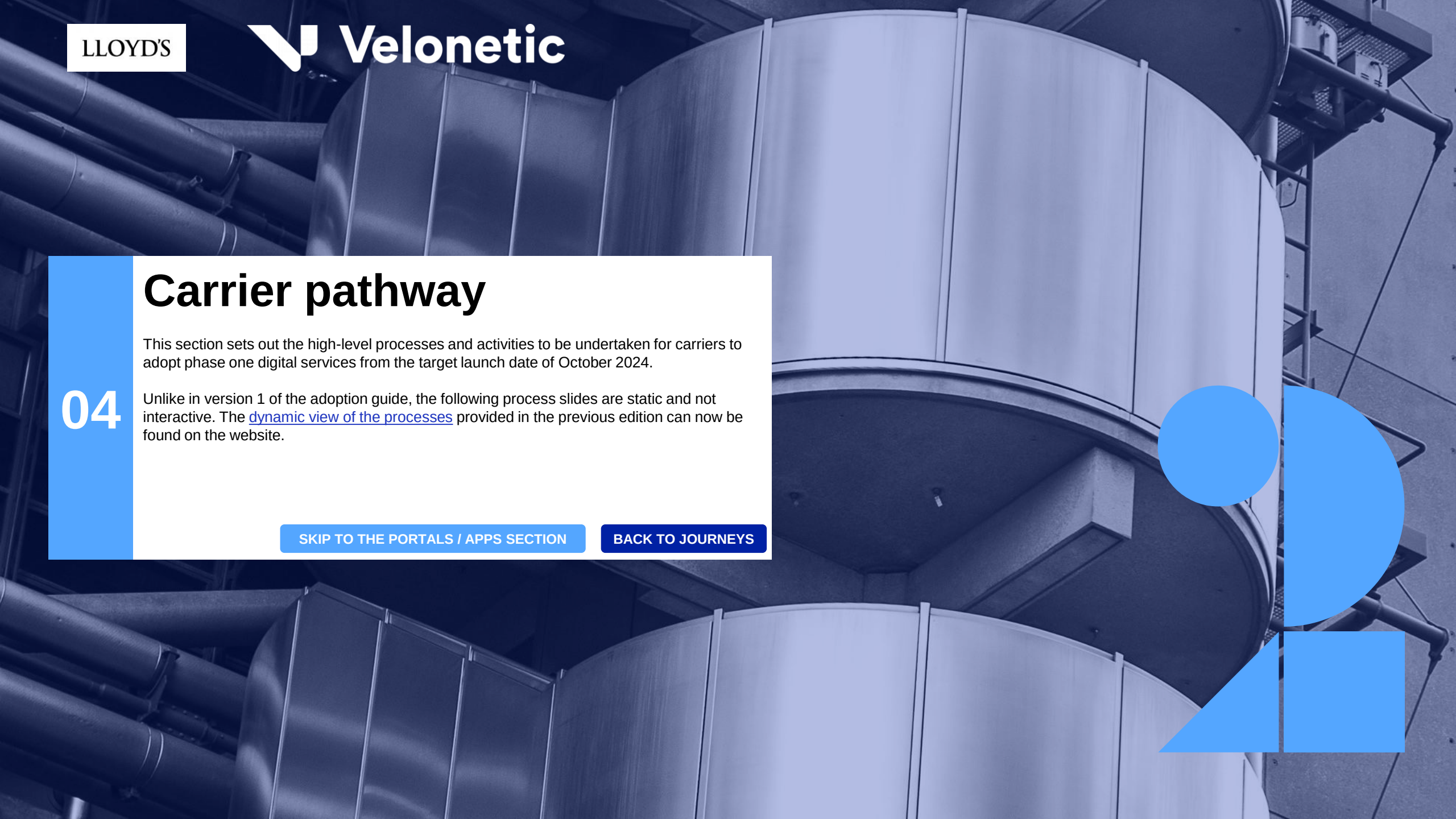
Release date	Message type	Description	Changes	Technical specification	Participant
17 January 2023	BSM	Lloyd's (ILU+LIRMA: BSM (SIGNIN))	No	BSM	Brokers
17 January 2023	LIMCLM	ILU / LIRMA	No	LIMCLM (response)	Brokers / Carriers
17 January 2023	LIMCLM (response)	Broker Claim Submission – Including: LIMRES, CLMLLB, CLMILB & CLMLRB	No	LIMCLM (response)	Brokers / Carriers
23 March 2023	IPCBSM	Delinked messages	No	IPCBSM	Brokers
23 March 2023	RESETT	Delinked Instruction	No	RESETT RESETT Appendix	Brokers
23 March 2023	CLMLRB	Claim Notification (see note one above)	No	CLMLRB (Broker)	Brokers
23 March 2023	CLMILC	Claim Notification (see note one above)	No	CLMILB (Broker) CLMILC (Carrier) CLMLLB (Broker)	Brokers / Carriers
29 March 2023	Appendix F2 - LIMRIN	LORS – Broker Submission message	No	Appendix F2 - LIMRIN	Brokers
29 March 2023	Appendix F4 - LIMRID	LORS – Cancel and delete message	No	Appendix F4 - LIMRID	Brokers / Carriers
29 March 2023	Appendix F6 - LIMRIS	LORS – Status reporting message	No	Appendix F6 - LIMRIS	Brokers / Carriers

Broker EDI messaging specifications (2 of 3)

Release date	Message type	Description	Changes	Technical specification	Participant
31 March 2023	Appendix F7 - LIMRES	LORS – Error and confirmation message	No	Appendix F7 - LIMRES	Brokers / Carriers
29 March 2023	Appendix A - Data Glossary	LORS	No	Appendix A - Data Glossary	Brokers / Carriers
31 March 2023	Appendix B - Code sets	LORS	No	Appendix B - Code sets	Brokers / Carriers
31 March 2023	Appendix C – Segment Directory	LORS	No	Appendix C – Segment Directory	Brokers / Carriers
31 March 2023	Appendix D – Edifact level a character set	LORS	No	Appendix D – Edifact level a character set	Brokers / Carriers
31 March 2023	Appendix E1 – Error codes per data element	LORS	No	Appendix E1 – Error codes per data element	Brokers / Carriers
31 March 2023	Appendix E2 – Validation rules	LORS	No	Appendix E2 – Validation rules	Brokers / Carriers
31 March 2023	Appendix F1 – Message terms and definitions	LORS	No	Appendix F1 – Message terms and definitions	Brokers / Carriers
31 March 2023	Appendix G – Registration	LORS	No	Appendix G – Registration	Brokers / Carriers

Broker EDI messaging specifications (3 of 3)

Release date	Message type	Description	Changes	Technical specification	Participant
31 March 2023	Appendix H – sla (LORS service summary)	LORS	No	Appendix H – sla (LORS service summary)	Brokers / Carriers
31 March 2023	LORS batch data information manual	LORS	No	LORS batch data information manual	Brokers / Carriers
29 March 2023	MCM	Lloyd's	No	MCM	Brokers / Carriers



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04

Carrier pathway

This section sets out the high-level processes and activities to be undertaken for carriers to adopt phase one digital services from the target launch date of October 2024.

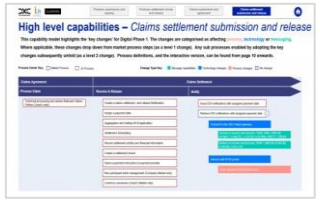
Unlike in version 1 of the adoption guide, the following process slides are static and not interactive. The dynamic view of the processes provided in the previous edition can now be found on the website.

SKIP TO THE PORTALS / APPS SECTION

BACK TO JOURNEYS

Introduction to 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 LPAN (London Premium Advice Note) either via DRI (Document Repository Interoperability) or IMR (Insurers' Market Repository) portal. Submissions are accompanied by a MRC v3 (Market Reform Contract v3), 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 SND (Signing Number and Date) 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 the IPOS (International Premium Orchestration Service) portal 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 a LIMCLM (London Insurance Market Claims Messages) and supporting documents via DRI or ICOS (International Claims Orchestration Service) portal. Submissions will include a UCR (Unique Claim Reference) and UMR (Unique Market Reference). The data will be validated 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 processing processes show how the market can triage the claims, send to the carriers to 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 a payment date and forwarded onto the settlement service.

Changes to the carrier premium submission & signing process

Summary of changes for carriers

Carriers will continue to view submissions and associated documents in the IMR portal as they do today. However, queries will be managed via the IPOS portal, requiring carriers to connect to the IPOS portal to view and respond to queries on the LPANs. All carriers will also need to connect to the market gateway (ASG Adept) to retrieve and process signing messages such as (cash LPAN) USM, ILUCSB, ILUCSM, IPCCSM, IPCDSM and WSETT/ DSIGN. Carriers will need to ensure that the format, structure and content of their messages have not changed.

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

Premium submission and signing | Premium settlement review & release | Claims submissions & agreement | Claims settlement & release

Create & submit	Receive & validate	Process & store	Notify
Log in to the IMR portal	Ingest premium submission	Log in to the IMR portal	Log in to the IMR portal
Send premium submission via the IMR portal	Validate the submission against the MRC v3 and supporting documents	View submissions and documents in the IMR portal	View submissions and documents in the IMR portal
Upload documents to the IMR	Retrieve MRC v3	Process premium submission	Issue EDI notifications
Create a premium submission via DRI (cash or delinked) *	Log, compile and provide errors	Process non-fundamental splits	Retrieve EDI notifications
	Store premium submission	Log, compile and provide errors	Connect to the market gateway (ASG Adept)
		Manage and resolve queries	Carriers to receive and process (cash LPAN) USM / ILUCSB / ILUCSM/ WSETT/ DSIGN
		Respond to queries	Carriers to receive and process (de-linked) IPCCSM,IPCDSM / USM
		Interact with IPOS portal	
		View and respond to queries in the portal	
		Update premium submission record	

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

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

Changes to the carrier premium settlement review & release process

Summary of changes for carriers

Carriers will need to connect to the IPOS portal to view and respond to queries on premium settlement release notifications. All carriers will also need to connect to the market gateway (ASG Adept) to retrieve and process settlement messages such as ILUCSB, ILUCSM, WSETT and DSIGN.

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

Premium submission and signing | **Premium settlement review & release** | Claims submissions & agreement | Claims settlement & release

Create & submit	Receive & validate	Process & store	Notify
Create a premium settlement release notification	Ingest RESETT message and validate premium submission against the delinked LPAN	Process premium settlement review and release and assign a payment date	Issue EDI notifications
	Ingest the portal release and retrieve LPAN	Log, compile and provide errors	Retrieve EDI notifications
	validate against the delinked LPAN for portal submission	Manage and resolve queries	Connect to the market gateway (ASG Adept)
	Log, compile and provide errors	Respond to queries	Carriers to receive and process USM / ILUCSB / ILUCSM / WSETT/ DSIGN
	Issue EDI notifications	Interact with IPOS portal	
	Retrieve EDI notifications	View and respond to queries in the portal	
	Store premium submission	Update premium records	

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

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

Changes to the carrier claims submissions & agreement process

Summary of changes for carriers

Carriers will need to connect to the ICOS portal to view claim submissions, and to view and respond to queries. All carriers will also now have to connect to the market gateway (ASG Adept) 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. In addition, carriers will need to ensure that the format, structure and content of their EDI messages have not changed.

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

Premium submission and signing → Premium settlement review & release → **Claims submissions & agreement** → Claims settlement & release

Create & submit	Receive & validate	Claims decision
Connect to the IMR portal	Ingest all claims submissions and technically validate	Route to relevant claim parties for agreement or denial
Upload documents into the IMR	Ingest the portal submission	Receive claim decision (agreement, query or denial)
Create a LIMCLM claims submission	Retrieve MRC v3 / premium paid status, claims history	Manage and orchestrate queries
	Validate claim against the MRC v3, claims history and premium records	*Raise and respond to queries
	Issue acknowledgements	Interact with the ICOS portal
	Receive acknowledgements	View and action queries in the portal
	Interact with the ICOS portal	Issue EDI notifications
	Receive portal notifications	Retrieve EDI notifications
	View submissions in the portal	Connect to the market gateway (ASG Adept)
	Issue EDI notifications	Receive / send Writeback notifications (carriers only)
	Retrieve EDI notifications	Ingest / receive CWT Notifications (carriers only)
	Connect to the market gateway (ASG Adept)	Carriers to receive & process: CLMILC,CLMLRC, SCM
	Receive and ingest a LIMRES	

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

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

NB * Only carriers are able to raise queries

Changes to the carrier claims settlement & release process

Summary of changes for carriers

In order to continue receiving and processing EDI notifications with assigned payment date (e.g. CLMILC, CLMLRC), carriers will need to connect to the market gateway (ASG Adept). All carriers will also need to ensure that the format, structure and content of their EDIs have not changed. In addition, carriers will need to log into the ICOS portal to be able to view the notifications.

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

Premium submission and signing → Premium settlement review & release → Claims submissions & agreement → **Claims settlement & release**

Process claim	Receive & release	Notify
Technical processing and advise Relevant Claims Parties (Lloyd's only)	Create a claims settlement and release notification	Issue EDI notifications with assigned payment date
	Assign a payment date	Retrieve EDI notifications with assigned payment date
	Aggregation and netting off (if applicable)	Connect to the market gateway (ASG Adept)
	Settlement scheduling	Carriers to receive and process: SCM, USM, LIMCLM, (CLMILC, CLMLRC), ILUCSB, ILUCSM), WSETT, DSIGN
	Record settlement activity and financial information	
	Create a settlement record	Log into the ICOS portal
	Send a payment instruction to payment provider	Receive notifications
	Non participant bank management (company market only)	Interact with ICOS portal
	Currency conversion (Lloyd's Market only)	View progress in the ICOS portal

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

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

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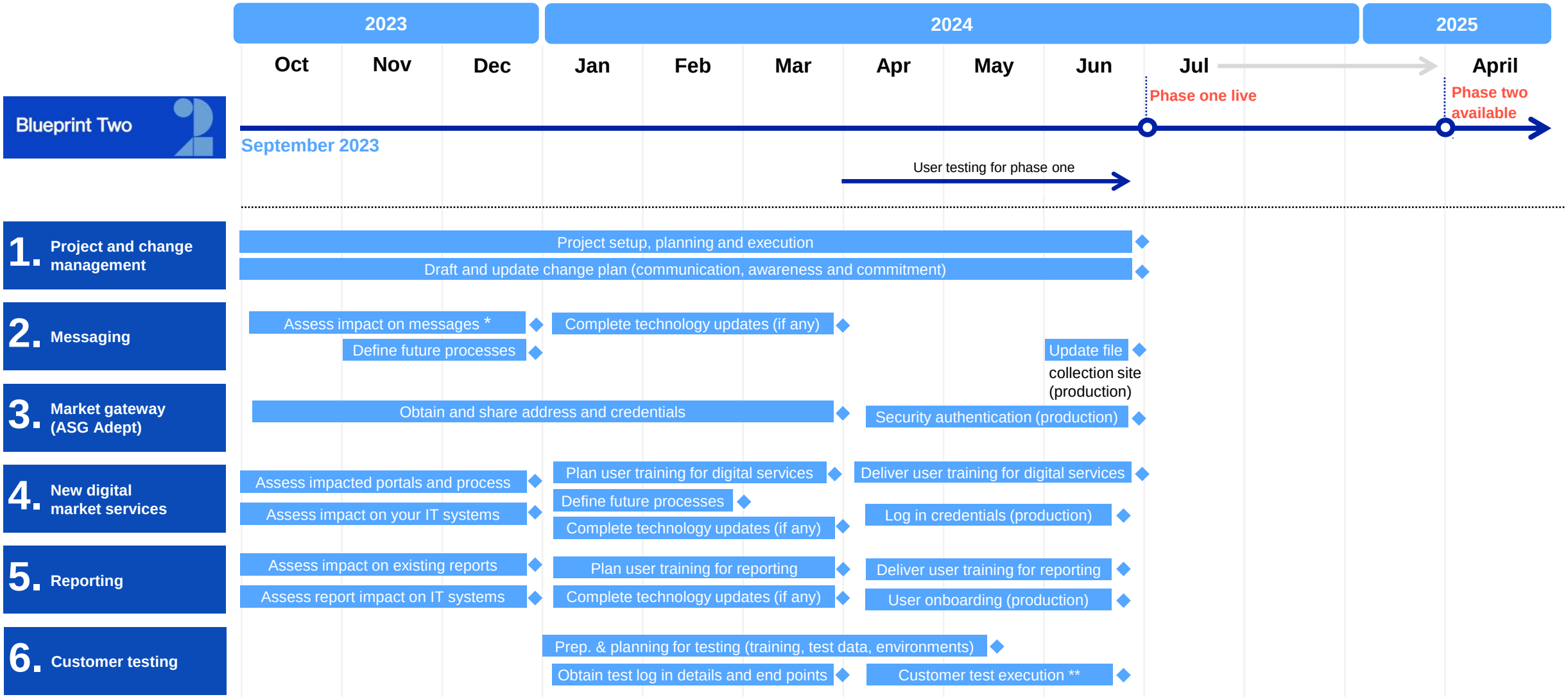
04

Carrier: adoption activities

This section sets out the recommended practical activities to be undertaken for carriers to adopt phase one digital services successfully from the target launch date of October 2024.

BACK TO JOURNEYS

Carrier timeline: phase one digital services



NB * If you use Write-Back, also check the technical specifications for these to ensure alignment with these for continued use.
****** If you have chosen the optional service Vitesse you will need to test it at this point also.

Timelines have not yet been updated following the 28 March announcement of a change to the date of phase one cutover.

Carrier adoption activities: project and change management

Summary of the change

- To enable effective preparation and adoption of digital phase one services it is recommended that a specific project is mobilised within your firm.
- This project should have a nominated sponsor, dedicated resourcing and an agreed budget.

Additional information

— All firms will need to use phase one digital services from the target launch date of October 2024 to continue trading in the market. This set of digital services will utilise the new digital processing platform, with minimal impact to brokers and carriers.

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Awareness, commitment & communication	— 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. *A stakeholder analysis template is available to support this activity*.	— This stakeholder list will identify all individuals to be involved in or regularly informed of Blueprint Two readiness and adoption progress.	Q3 2023	✓		
	— Provide monthly progress updates to identified stakeholder groups to reinforce the change benefits, and seek feedback / questions. *Benefits are highlighted in the Benefits Framework on the Blueprint Two website*.	— Regular communications will enhance commitment and buy-in from those impacted by the change.	Ongoing	✓		
Plan and resourcing	♦ Develop an adoption change plan, detailing the activities, owners and due dates.	— A plan with sufficient level of detail to manage and track adoption activities to achieve the October target go-live.	Q3 2023		✓	
	♦ Identify and secure the roles / people to deliver the plan (and feel free to run it by your engagement partner if helpful).	— A project team in place to achieve delivery of the October target go-live.	Q3 2023	✓		
Budgeting	♦ Estimate all costs 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.). ♦ Prepare a budget allocation proposal that outlines the budget breakdown for Blueprint Two phase one digital services, and present this to project sponsors and stakeholders for review and approval.	— Validated budget allocation proposal (BP2 business case)	Q3 2023	✓		

♦ **Updated activity**

Carrier adoption activities: messaging (1 of 2)

Summary of the change

- **Change is not expected to the structure, format or data content of standard EDI messages** in digital phase one
- The programme is being run on an agile basis so there remains a slight risk that specifications for standard EDIs may need to be altered to align with the build of the digital processing services. **Any changes will be minor, and you will be notified as soon as possible.**
- **All messages will go to and from the market gateway** (ASG Adept), rather than the existing XAG / XDH / XSH Gateways.
- **Certain EDI customisations may not be supported in the future.**

Additional information

- We recognise that even if one single data field changes, it may have a knock-on impact on straight through processing or require assessment of existing systems to understand if changes are required.
- As sequence numbers are needed for the mainframe but not for digital services, the field will still be included to avoid disrupting the message content, but will be reset to zero from cutover.
- The final carrier EDI technical specifications can be found in this section. Vendors can use these to make any amendments required to produce or consume the new EDI messages.
- Carriers using Write-Back should also check the technical specifications to ensure alignment

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on standard messages (if any)	— Identify and document any individuals who currently interact with / rely on messaging from the Velonetic. *The stakeholder analysis tool is available to support this activity*	— This 'messaging stakeholder' list will ensure a full understanding of who will be impacted, so they can be prepared for the change.	Q3 2023	✓		
	— Identify and document current processes that interact with and / or support existing messages. *(e.g. receiving and processing signing messages such as IPCCSM, IPCDSM / USM)*	— These 'as is' processes will provide a basis for assessing the impact of the change and inform any testing that may be required.	Q3 2023		✓	
	— Review the published Blueprint Two technical specifications to ensure your carrier messaging matches those specifications. (e.g. USM, ILUCSB)	— This impact assessment will provide a basis for adapting 'as is' processes that interact with / rely on messaging.	Q3 2023		✓	
	♦ If you use Write-Back, check the technical specifications to ensure alignment with these for continued use. We expect Write-Back messaging to evolve to meet the digital needs of phase two, so look out for future updates.	— This will help ensure that there is no interruption to Write-Back messaging after phase one go live.	Q3 2023		✓	
	♦ Look out for updates on any minor variances to the published EDI messages that may occur as the build continues. These will be published and your engagement partner will be aware if and when they are confirmed.	— This will ensure that you continue to work with the latest version of all EDI messages.	Q4 2023		✓	
	— Establish the impact of any message data 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?	— This will help ensure that there is no interruption to existing messaging processes after phase one go live.	Q4 2023			✓

♦ **Updated activity**

Carrier adoption activities: messaging (2 of 2)

Adoption activities (continued):

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on customised messages (if you have any)	— Establish if you currently use customised / transformed EDI messages. Your engagement partner will be able to help you determine if you have customised messaging.	— This will inform whether you need to decide a go forward approach for customised / transformed EDI messages.	Q3 2023		✓	
	♦ Decide if you wish to continue using customised messages, if available, or wish to revert to standard EDI versions to avoid potential additional cost. ♦ **Note**: Velonetic will confirm which customisations will be taken forward and at what cost in Q4 2023. Only widely used customisations are likely to be supported. You should plan to move away from bespoke renames or conversions now.	— This will enable you to understand the resources and cost of moving away from customised messaging now, and understand if there is an opportunity to continue using your customised messages and at what cost later, once published by Velonetic.	Q4 2023		✓	
	— If your existing customised messages will no longer be supported, or you no longer need them, work with your IT team and / or service provider to compare the structure, format and content of the published specifications against your customised messages. ♦ Feed this into your change plan and establish the cost and resources required to move to standard EDI equivalents for phase one go live.	— This detailed analysis will help establish the scale and cost of the change for your business.	Q4 2023		✓	
Define 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. *The change impact assessment tool and change plan templates are available to support this activity.*	— These will be the 'to be' processes to be adopted in readiness for phase one go-live.	Q4 2023		✓	
Make technology updates	— In the case that you need to make updates to your messages / automated process / robotics technology 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.	Q1 2024			✓
Changes to the file collection locations	— 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. ○ In the case of manual data collection work with your IT team / service provider to update to the new file collection locations once confirmed by the Velonetic. ○ 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 location.	— This will ensure that data file collection can continue.	Q2 2024			✓

♦ **Updated activity**

Carrier adoption activities: market gateway (ASG Adept)

Summary of the change

- Requirement to connect to the market gateway **(ASG Adept) for all messaging**, rather than the existing XAG / XDH / XSH Gateways.
- A **number of technology changes need to be implemented and tested** to ensure connectivity from October 2024 (target launch date). For example:
  1. The messaging origination point will change
  2. The SFTP location will change
  3. The security model will change requiring a new set of user profiles

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.
- More details on how to interface with the Velonetic Digital Processing Services will be provided in good time to enable testing from April 2024.
- Ahead of testing you, or your service provider, will be provided with a new IP address or URL, along with a username and password and any other credentials necessary.

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
New end point address and credentials	♦ Look out for updates on when you will be provided with new credentials and be able to connect to the market gateway (ASG Adept). This will be ahead of customer testing to ensure firms are ready in time.	— This will enable of the connection to the market gateway (ASG Adept).	Q1 2024			✓
	— Share the credentials with your IT team or service provider, who are responsible for reconfiguring your systems and testing the new gateway.	— This will provide the relevant technology team with the information required to make any relevant changes.	Q2 2024			✓
New security authentication process	— Ensure that your IT team or service provider implements the new security authentication processes in production ahead of phase one go-live. *Refer to the ASG Adept website to access the integration user guide.* ♦ **Note**: 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. **Note:** this information may not be available until Q1 2024.	— This will enable users to login after phase one go-live.	Q2 2024			✓

♦ **Updated activity**

Carrier adoption activities: new digital market services (1 of 2)

Summary of the change

- Market firms will have **access to a new digital processing services** (International Premium and Claims Orchestration Services), **replacing existing portals**
- **The current functionality contained in the existing portals / applications,** such as LIDS, CLASS and ECF (XIS, XCS), **will be transferred to the new portals** (IPOS / ICOS)
- **Existing portals and applications will not be available from cutover on October 2024 (target launch)**

Additional information

- New portals (IPOS and ICOS) are being introduced to help process premium accounting and settlement and claims workflow and settlement respectively for open market and delegated authority risks.
- Velonetic technicians will process and settle transactions using the new digital processing services.
- Visuals of the new IPOS / ICOS portal screens will be shared once available

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on the portals you use today	— Understand which portals / applications will no longer be available, the functionality they currently provide and what replaces them. *Use the portals / applications section of this guide to complete this activity*.	— This analysis between the existing and new portals will establish the scale of the change for your business.	Q4 2023		✓	
	— Identify and document current processes that interact with or support these existing portals. *The portals / apps Excel tracker is available to help you kick off this activity*.	— These 'as is' processes will provide a basis for assessing the impact of the change.	Q4 2023		✓	
Identify impacted users	— Identify and document the individuals who currently log onto the existing premium or claims portals / applications.	— This user list will inform adoption activities such as creation of login credentials and identification of training needs.	Q4 2023	✓		
	♦ Identify an administrator who will create new users, secure log in credentials and manage new future users / leavers for onboarding and testing prior to go live. — **Note:** A single login credential will be used for both IPOS/ICOS and Qlik Sense	— This will ensure you have somebody responsible for obtaining log in credentials that can be tested ahead of go live and to manage future users.	Q4 2023	✓		

♦ **Updated activity**

Carrier adoption activities: new digital market services (2 of 2)

Adoption activities (continued):

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on existing IT processes and internal IT systems	— Establish if your internal systems interact with any of the portals / applications that will no longer be available. Document these changes and inform your IT team / service providers.	— 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.	Q4 2023		✓	✓
	— The IPOS & ICOS screens as a whole package will not be available until March 2024. However, as they are built, screen shots will be provided to the market to analyse and document any IT systems changes required. Capture changes in your change plan. *A change plan template is available to support.*	— This will enable you to track the changes required ahead of phase one go live.	Q1 2024		✓	
	— In the case that you need to make updates to your systems work with your IT team / service provider to update the interaction to the new portals.	— This will ensure that interaction can continue with the new portals.	Q1 2024			✓
Define future processes	— Document the changes required to the existing portal / application processes and update any user manuals. *This can be recorded in a change impact assessment tool (a template is available to support this activity) and should form part of your change plan (a template is available to support this activity).*	— This activity will help define your 'to be' processes.	Q1 2024		✓	
Login credentials and security specifications	♦ Obtain log in credential for IPOS & ICOS portals once available from Velonetic.	— This will ensure your 'portal users' have log in credentials that can be tested ahead of go live.	Q2 2024	✓		
	— Review your own security specifications and work with your IT team and / or service provider to ensure that users can access the new portals (e.g. is chrome installed etc).	— This will ensure the environment is compliant with your internal security requirements.	Q2 2024			✓
Market firms will have the option to use Vitesse direct settlement services	♦ Agree with the relevant stakeholders (e.g. Claims team) in your organisation on whether or not you want to use Vitesse direct settlement	— This will ensure all stakeholders are aligned on whether Vitesse direct settlement will be adopted	Q4 2023		✓	
	♦ If you would like to take advantage of these services, please advise your CRM contact at onboarding that you wish to be enrolled. They will need to contact Vitesse (via Velonetic) on your behalf to set up an account or facility ♦ Decide whether you would like to set up a funded or non-funded account: ○ **Funded accounts** – carriers pay in an agreed fund from which payments are taken. Payments are made automatically, and notifications sent if the fund is running low as per pre-defined limits. ○ **Non-funded accounts** – each transaction to be funded separately.	— This will allow you to use Vitesse if desired, unlocking the capability to make payments in hours rather than days.	Q1 2024		✓	
User training	♦ Upskill users who will be using the new digital market services by ensuring they access the training materials available.	— This will ensure users are able capable of using the new digital market services from go-live.	Q2 2024	✓		

♦ **Updated activity**

Carrier adoption activities for phase one: reporting (1 of 2)

Summary of the change

- A **self-serve approach will be introduced to reporting** with a**ll existing reports being available** in the new digital services, including bespoke reports.
- Functionality from **existing reporting portals / apps** (e.g., Brio, Infoview) will be **replaced by the Qlik Sense reporting tool**. Qlik Sense is a web-based application, allowing users to view reports online. All reports are **downloadable from Qlik Sense in excel / CSV / PDF**. The data will be **extracted straight from IPOS / ICOS** so all **data will be the same format (no bespoking).**
- A number of **people, process and technology changes** need to be implemented to **ensure relevant reports will be received from Phase one go live.**

Additional information

- Reporting will be via a self-serve **pull capability**, allowing users to **download reports directly form the online service.** Reports will no longer be emailed to market firms
- Consideration is being given to how to automate the sending of reporting from Qlik Sense, which may initially include a download to an SFTP site as a starting point.
- All existing reports (standard or bespoke) will be available in Qlik Sense, based on the fields and data that are available today. The flexibility of Qlik Sense means that additional new reports can be set up.
- Reports can be scheduled to be available on a specific date
- Data will be updated daily via an overnight process.

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on existing reports and associated processes	♦ Create a list of the reports you currently receive and document how they are collected, who the recipients are and how they are used. — **Note:** Velonetic is investigating whether it can share details with each participant as to what reports they receive today. This is expected to be confirmed in Q4 2023.	— Provides a baseline from where to assess the impact.	Q4 2023		✓	
	♦ Based on your report list, categorise which existing reports will continue to be used post go-live and any reports that are no longer required. Assign a report owner(s) for each report that will continue to be used.	— Ensures redundant reports are not recreated, saving unnecessary effort.	Q4 2023		✓	
	— Identify where these reports are currently sent to or collected from, and define how this process will be updated post go-live when emailing of reports will be replaced by self-service reporting.	— Ensures that recipients will continue to be able to receive or to access the reports they need.	Q4 2023		✓	

♦ **Updated activity**

Carrier adoption activities: reporting (2 of 2)

Adoption activities (continued):

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Impact on existing reporting IT processes and internal IT systems	♦ Understand whether there is an automated process that feeds report data into other databases, as you may need to pull the raw data in different way to continue that process. ○ In the short-term, it is likely that reporting data will 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 MI team, to agree the best solution. ○ The longer-term solution is to send report data via an API, but this will not exist as from phase 1 go-live.	— This will ensure that data can still be fed from reports into other databases from phase one go-live.	Q4 2023			✓
	— Assess and define any changes that will need to be made to existing systems when replaced by self-service reporting.	— Documenting any technology changes will ensure you are on track to connect to the reporting tool once phase one goes live	Q4 2023			✓
	♦ 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.	— This will ensure that reporting can continue with the new digital services.	Q1 2024			✓
User onboarding for reporting	♦ 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. ♦ **Note**: User set up in the Qlik Sense tool is expected to commence in Q1 2024. It is anticipated that customers will not require a separate log on. Once you have an ICOS / IPOS log in then you can log into Qlik Sense as it is part of a single domain.	— This user list will inform adoption activities such as creation of login credentials and identification of training needs.	Q1 2024	✓		
User training for reporting	♦ Provide reporting owners with upskilling by reading the Qlik Sense training pack once available from Velonetic.	— Provide support to the reporting owners who will use Qlik Sense.	Q2 2024	✓		
	♦ There will be some rationalisation of language for reporting (e.g. Claim number, ID, reference), so look out for details of these changes from Velonetic in Q2 2024.	— This terms / descriptions dictionary will help report users to navigate any rationalisation of language	Q2 2024	✓		

♦ **Updated activity**

Carrier adoption activities: customer testing (1 of 2)

Summary of the change

- We already have some market firms involved in early testing and the learning from that will help shape the **market-wide testing that will begin in April 2024.**
- Testing scope and methodology are dependent on the **customer testing model,** which will be **communicated in the December market event.**
- **Service providers will need to test the digital services** for their clients and access will be made available to them for the testing period.
- **New portals**, the **Qlik Sense tool** and any **updates to messaging** processes will all need to be tested prior to cutover.

Additional information

- Market firms will need to sign a new Digital Processing Services Agreement (DPSA) ahead of phase one go live. This should be ready to view in January 2024. It will replace the current service agreement called FERN2.
- Every user will require log in details to access the new services and these will need to be maintained by each market firm for new joiners and leavers.
- Access to the new portals will need to be confirmed and tested

Adoption activities:

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Preparation and planning for testing	— Identify a test lead who will be responsible for leading the testing efforts and the individuals who will support with test execution.	— This list of testing team members will give clarity on who is involved in testing and allow them to plan for this.	Q4 2023	✓		
	♦ Define the overall strategy and approach for testing. — **Note**: Testing scope and methodology are dependent on the customer testing model, which will be communicated in the December market event.	— This will ensure testing goals, scope, and methodologies are agreed upfront.	Q1 2024		✓	
	♦ Develop detailed test plans for testing the four core market processes. Your test plan should include test cases, scenarios, schedules and resource requirements.	— This will ensure your testing team members are	Q1 2024		✓	
	♦ Gain an understanding of the detailed test process and how queries / defects are submitted to Velonetic via their online tool for resolution. Details of the testing approach are expected to be shared in December 2023.	— This will ensure that testing can be proactively managed, and any issues tracked to resolution.	Q1 2024			✓
	♦ Deliver training sessions for those who will be involved in testing.	— To ensure testers are familiar with the testing approach and tools	Q1 2024	✓		

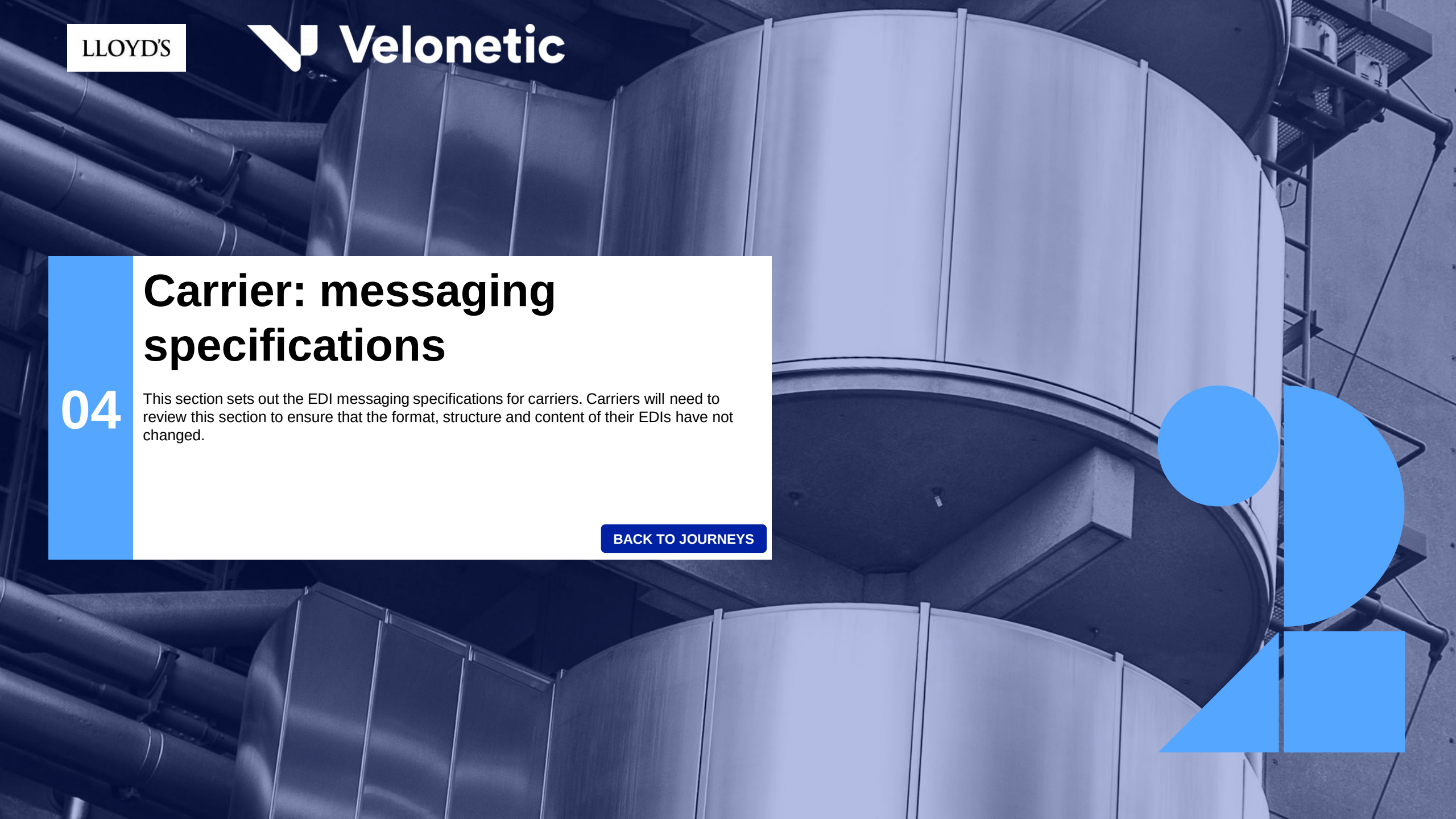
♦ **Updated activity**

Carrier adoption activities: customer testing (2 of 2)

Adoption activities (continued):

Topic	Carrier activity	Target outcome	Target date	People	Process	Tech
Test data and environment setup	♦ Coordinate with your IT/DevOps teams or service provider to allocate and set up test environments.	— This will ensure that testing environments are ready and available for Q2 2024	Q1 2024			✓
	♦ Where possible, prepare test data sets that cover various scenarios, and verify that all testing documents are complete (test plans, test cases, any other relevant docs)	— This will ensure that necessary test data is available for testing, and that all testing documents are up to date	Q1 2024		✓	
Test log in details	♦ Obtain log in details to the Velonetic test environments, e.g. file collection site, market gateway (ASG Adept) and portal log in details.	— This will ensure access to the test environments.	Q1 2024	✓		
Test execution and tracking	♦ Work with your IT/Dev Ops team or service provider to perform a readiness check to ensure the test environments are set up as planned	— This will help verify that the test environments are correctly configured to be able to start testing promptly	Q1 2024			✓
	♦ In Q2 2024, your IT/DevOps team or service provider should be able to begin executing test cases and scenarios according to the established test plans. Your testing should cover the IPOS/ICOS portals, connection to the market gateway (ASG Adept) and messaging. These items should be tested in the context of various market processes: ♦ Premium submission and signing ♦ Premium settlement review and release ♦ Claims submissions and agreement ♦ Claims settlement submission and release ♦ Test that users can access Qlik Sense for reporting requirements, and that report automation (if required) is working ahead of phase one go live	— Following a structured approach will ensure a smoother and more organised testing phase.	Q2 2024			✓
	♦ Utilise the online system to log and report any identified defects or issues ♦ If required, perform regression testing after fixes and changes, to ensure this hasn't introduced new issues	— Monitoring and reporting defects will enable issues to be resolved ahead of phase one go-live	Q2 2024			✓
	♦ Through regular review meetings, keep stakeholders informed of testing progress, challenges and adjustments. Once the final test reports have been prepared, conduct a test completion meeting to obtain sign-off from your project sponsors / adoption lead	— Ensures stakeholders are kept informed of testing progress	Q2 2024	✓		

♦ Updated activity



Carrier: messaging specifications

04

This section sets out the EDI messaging specifications for carriers. Carriers will need to review this section to ensure that the format, structure and content of their EDIs have not changed.

BACK TO JOURNEYS

Carrier EDI messaging specifications (1 of 3)

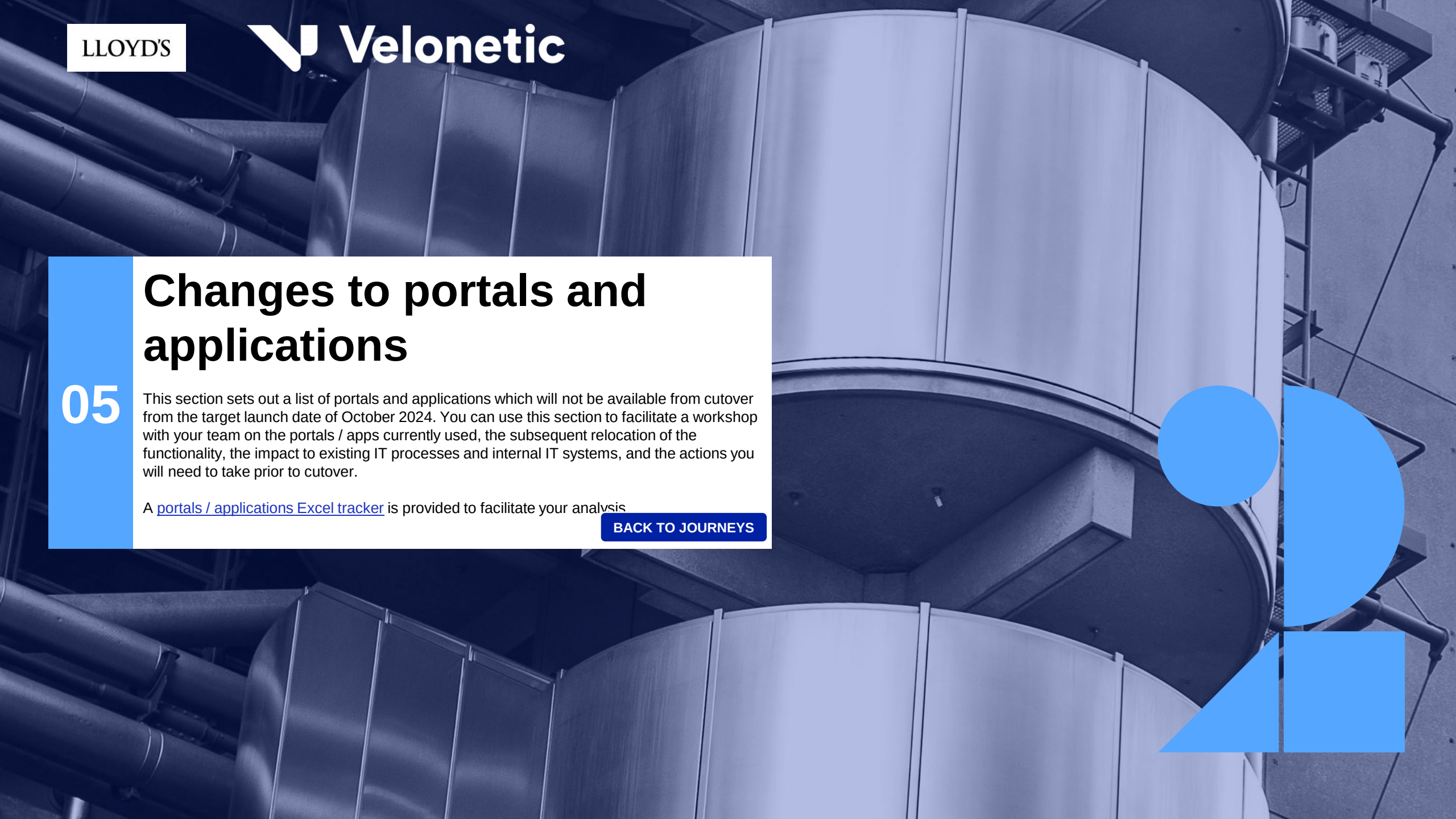
Release date	Message type	Description	Changes	Technical specification	Participant
19 December 2022	ILUCSB V2	ILU	No	ILUCSB V2	Carriers
19 December 2022	WSETT	LIRMA	No	WSETT	Carriers
17 January 2023	DSIGN	LIRMA	No	DSIGN DSIGN Appendix	Carriers
17 January 2023	USM V9	Lloyd's	No	USM V9.2	Carriers
17 January 2023	SCM	Lloyd's	No	SCM	Carriers
17 January 2023	ILUCSM	ILU	No	ILUCSM Companies Signing Message ILU ILUCSM Companies Signing Message Appendices ILU	Carriers
17 January 2023	LIMCLM	ILU / LIRMA	No	LIMCLM (response)	Carriers / Brokers
17 January 2023	LIMCLM (response)	Broker Claim Submission – Including: LIMRES, CLMLLB, CLMILB & CLMLRB	No	LIMCLM (response)	Carriers / Brokers
31 January 2023	IPCDSM	Delinked messages	No	IPCDSM	Carriers
31 January 2023	IPCCSM	Delinked messages	No	IPCCSM IPCCSM Appendices	Carriers

Carrier EDI messaging specifications (2 of 3)

Release date	Message type	Description	Changes	Technical specification	Participant
23 March 2023	CLMLRC	Claim Notification (see note one above)	No	CLMLRC (Carrier)	Carriers
23 March 2023	CLMILC	Claim Notification (see note one above)	No	CLMILB (Broker) CLMILC (Carrier) CLMLLB (Broker)	Carriers / Brokers
29 March 2023	Appendix F3 - LIMRIA	LORS – Underwriter advice message	No	Appendix F3 - LIMRIA	Carriers
29 March 2023	Appendix F4 - LIMRID	LORS – Cancel and delete message	No	Appendix F4 - LIMRID	Carriers / Brokers
29 March 2023	Appendix F6 - LIMRIS	LORS – Status reporting message	No	Appendix F6 - LIMRIS	Carriers / Brokers
31 March 2023	Appendix F7 - LIMRES	LORS – Error and confirmation message	No	Appendix F7 - LIMRES	Carriers / Brokers
29 March 2023	Appendix 5 - LLDUWR	LORS – Underwriting response message	No	Appendix 5 - LLDUWR	Carriers
29 March 2023	Appendix A - Data Glossary	LORS	No	Appendix A - Data Glossary	Carriers / Brokers
31 March 2023	Appendix B - Code sets	LORS	No	Appendix B - Code sets	Carriers / Brokers

Carrier EDI messaging specifications (3 of 3)

Release date	Message type	Description	Changes	Technical specification	Participant
31 March 2023	Appendix C – Segment Directory	LORS	No	Appendix C – Segment Directory	Carriers / Brokers
31 March 2023	Appendix D – Edifact level a character set	LORS	No	Appendix D – Edifact level a character set	Carriers / Brokers
31 March 2023	Appendix E1 – Error codes per data element	LORS	No	Appendix E1 – Error codes per data element	Carriers / Brokers
31 March 2023	Appendix E2 – Validation rules	LORS	No	Appendix E2 – Validation rules	Carriers / Brokers
31 March 2023	Appendix F1 – Message terms and definitions	LORS	No	Appendix F1 – Message terms and definitions	Carriers / Brokers
31 March 2023	Appendix G – Registration	LORS	No	Appendix G – Registration	Carriers / Brokers
31 March 2023	Appendix H – sla (LORS service summary)	LORS	No	Appendix H – sla (LORS service summary)	Carriers / Brokers
31 March 2023	LORS batch data information manual	LORS	No	LORS batch data information manual	Carriers / Brokers



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05

Changes to portals and applications

This section sets out a list of portals and applications which will not be available from cutover from the target launch date of October 2024. 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.

BACK TO JOURNEYS

LPC / Casa services will be accessed via ICOS & IPOS from the target launch date of October 2024

Below is a list of the portals and applications which will not be available after October (target launch) 2024. 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)	**London Processing Centre (LPC)** A.k.a. Casa	https://casa.xchanging.com/	**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 (Lloyd's Outward Reinsurance System), PoSH, CLASS (Claims Loss and Advice Settlement System). Allows users single sign-on to these applications via portal SSO.**	ICOS	Yes*
	• Policy and Signing History [PoSH]	https://casa.xchanging.com/	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
	• Claims Loss and Advice Settlement System [CLASS]	https://casa.xchanging.com/	Enables brokers to load claim transactions and supporting material online. Enables claims to be accepted / rejected online using a messaging system.	ICOS	No
	• Document Management Screens [DMS]	https://ins.xchanging.com/	Screen for brokers to manage UCRs/UMRs (Unique Claim Reference and Unique Market Reference) and upload IMR (Insurers' Market Repository) documents whilst in the process of entering claims details into CLASS.	IPOS & ICOS	No
	• Lloyd's Outward Reinsurance System [LORS]	https://casa.xchanging.com/	— 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.	IPOS & ICOS	Yes*
	• General Enquiries (LPC)	https://casa.xchanging.com/	LPC menu entry: — General enquiries — Online viewer into the central settlement Data base	ICOS	Yes
	• Security Administration (LPC)	https://casa.xchanging.com/	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*

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 October 2024 (target launch). 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	**Insurance portal**	https://insuranceportal.xchanging.com/	**Portal as entry point to premium (and for brokers, claims) systems. Holds user and organisation details for market participants.**	IPOS & ICOS	No
	• Portal Single Sign-On [PortalSSO]	https://insuranceportal.xchanging.com/	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
	• Premium Tracker [PremTRK]	https://insuranceportal.xchanging.com/	Tracks the Velonetic processing of submitted premiums and tracks queries on any work (no longer used for paper, only electronic).	IPOS	No
	• Knowledge Base	https://insuranceportal.xchanging.com/	Subset of Insurance Portal. Holds business reference data / knowledge to assist processing.	Portal	No
	• Market Directory	https://diradmin.xchanging.com/	The portal from which various pieces of market information can be ascertained - sub application within Insurance portal.	IPOS & ICOS	No
ECF services	**Electronic Claim File (ECF2)**	https://sso.xchanging.com/	**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.**	ICOS	Yes
	• ECF2 Single Sign-On [ECF2SSO]	https://sso.xchanging.com/	Allows users to sign onto applications needed for ECF processing with one sign on.	ICOS	Yes
	• Claims Workflow Services [CWS]	https://sso.xchanging.com/ / https://ins.xchanging.com/	CWS uses CWT (Claims Workflow Triggers) to provide a claims workflow service for external users that are registered.	ICOS	Yes *
	• Claims Agreement Screens [CAS]	https://ins.xchanging.com/	Web screens in ECF2 (Electronic Claim File), interfacing to mainframe back end for agreeing ECF2 claims. Uses Attunity connection into mainframe.	ICOS	No
	• Document File Viewer [DFV]	https://ins.xchanging.com/	PDF view of IMR documents - part of ECF2 and access is via CAS (Claims Agreement Screen) once a claim is selected.	IPOS & ICOS	No
PbS	**Post-bind Submission (PbS) Online Query Portal**	https://sso.xchanging.com/	**Part of the PbS service. Provides capability for brokers, carriers and BPS technicians to create & respond to submission queries. Query response would be in the form of adding narrative or uploading documents via the portal to the IMR.**	IPOS & ICOS	Yes *

* *Further details to be confirmed ahead of testing*

Reporting portals & apps being replaced by Qlik Sense from the target launch date of October 2024

Below is a list of the portals and applications which will not be available after October 2024 (target launch). 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	http://crs.lloyds.com	Lloyd's Claims Reporting via Qlikview application.	Qlik Sense	No
	Infoview	https://insprd.xchanging.com/InfoViewApp/logon.jsp	Used by Internal and External parties to access reports created by Business Objects Reporting (BO).	Qlik Sense	No
	QlikView Reporting	https://mi.xchanging.com	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 *	http://itemisedbilling.xchanging.com/	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	**Account Enquiry**	http://accountenquiry.xchanging.com/	**Application that allows internal and external users to enquire on Premium and Treaty transactions processed by LIDS (Lloyd's Insurance Data System) online.**	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 require you to **access new screens via new URLs**, and will also need **new messaging IP addresses and security protocols** as shown below. 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]	https://xag.xchanging.com	Messaging Gateway receiving, translating and forwarding the incoming & outgoing messages from brokers, carriers, service providers and syndicates for the following services – Document Repository Interoperability (DRI) (A&S and ECF), eAccounts, PbS (Query portal), Writeback, Acord4All.	Market gateway (ASG Adept)	Yes*
	Xchanging Distribution Hub [XDH]	xfiles.xchanging.com xfilessoap.xchanging.com	Receipt, delivery and transformation application supporting various services that transact data between internal applications and external users (and vice -versa), predominantly Electronic Data Interchange (EDI) messaging.	Market gateway (ASG Adept)	Yes*
	Xchanging File Gateway [XFG]	xfiles.xchanging.com	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*
No change	Model Wordings Library [MWL] *	https://mwl.xchanging.com	Web based electronic library of information. Serves across different parties for policy production/checking.	N/A	No
	IMR Content Navigator [ICN] *	https://repository.xchanging.com/	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.	N/A	No
	PDF Conversion and Stitching [PCS] *	repository.xchanging.com	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*

LLOYD'S

Velonetic

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Appendix

1. Resources and further reading
2. Glossary

Phase one: resources and further reading

Resources and further reading
Phase one
Blueprint Two working session – 25 September 2023 (recording and slides)
Blueprint Two Q&A sessions – 10 July 2023 (recordings and slides)
Blueprint Two working session – 19 June 2023 (recording and slides)
User journeys
Market association playbooks
Benefits framework
FAQs
EDI specifications

Related to this guide
Stakeholder Analysis Tool
Change Impact Assessment Tool
Change Plan Template
Portals / Applications Tracker (Excel)

Key links

Blueprint Two website

Engagement Partners

Background reading

Phase one overview

Blueprint Two Solutions

Quarterly Progress Update

Other useful links:

London Market Group Data Council

ACORD

Core Data Record (CDR)

LIMOSS Market Business Glossary

Ask a question

Glossary

Acronym	Title	Further Information
ACORD	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.
ASG Adept	The market gateway (ASG Adept)	The ACORD Gateway handles the messaging, validates and translates the data and routes the submissions.
CAS	Claims Agreement Screen	An enhancement to ECF, delivered in the ECF2 implementation, to improve the ease by which an insurer can agree a claim.
Cash LPAN	Cash LPAN	Is and instruction to sign and settle which does not require and additional instruction from the broker.
CDR	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.
CLASS	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.
CWS	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).
CWT	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).
Data Store	The Data Store	The new central repository for the Core Data Record (CDR). The Data Store will only contain post bind data.
De- Linked LPAN	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
DFV	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.
Digital Gateway	The Digital Gateway	An automated risk data validator that enriches the CDR for central processing.
DMS	Document Management Screens	A computerised system used to store, share, track and manage files or documents.
DRI	Document Repository Interoperability	An ACORD technical standard that supports the automatic interchange of free-format documents between repositories.
EBOT	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.
ECF	Electronic Claim File	Current market system to enable insurers to review and correspond on claims.
ECOT	Electronic Claims Office Transactions	The use of ACORD messages for the management of the claims process.
EDI	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.
FA	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.
FNOL	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.

Glossary

Acronym	Title	Further Information
FTP	File Transfer Protocol	A standard communication protocol used for the transfer of computer files from a server to a client on a computer network.
ICOS	International Claims Orchestration Service	The product underpinning the Digital Claims Processing Services.
IMR	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.
IPOS	International Premiums Orchestration Service	The product underpinning the Digital Premium Processing Services.
LPAN	London Premium Advice Note	
LIDS	Lloyd's Insurance Data System	The XIS internal system used to process and store risk premium and policy history for the Lloyd's market.
LORS	Lloyd's Outward Reinsurance System	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.
MRC	Market Reform Contract	The standard for insurance contracts in the London market, established by the IUA, LIIBA and LMA.
MRC v3	Market Reform Contract version 3	A data-driven, structured contract that enables extraction of key placement processing data. This will replace the MRC.
MWL	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.
Non-Fundamental Splits	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.

Acronym	Title	Further Information
PoSH	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.
Query Management	Query Management	The ability to raise and deal with two-way queries between the parties in real time.
Reach-back	Reach-back	If there is no existing claims history, a process is triggered to fetch heritage data from the legacy claims systems.
SND	Signing number and date	
TA	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
Tax Calculator	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).
UCR	Unique Claim Reference	A reference applied to a claim record being processed through Central Services.
UMR	Unique Market Reference	The primary reference created by brokers and used by the Market to identify a contract.
USM	Underwriters Signing Message	The EDI message to support premium advices transmitted to Lloyd's Syndicates.
Writeback	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.