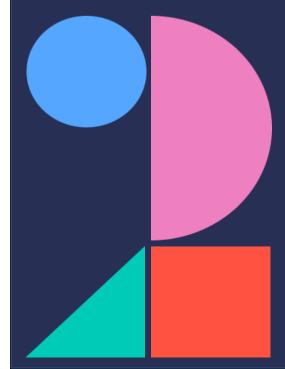


Get ready for the new digital services with a target launch date of October 2024

Phase one broker adoption checklist

Project and change management

Identify all stakeholders involved in the change including leadership, executive team and users of existing portals and support messaging
Provide monthly progress updates to identified stakeholder groups to reinforce the change benefits, and seek feedback
Develop an adoption change plan, detailing the activities, owners and due dates
Identify and secure the roles / people to deliver the plan
Estimate all costs associated with digital phase one adoption
Prepare a budget allocation proposal that outlines the budget breakdown for phase one digital services, present this to project sponsors and stakeholders for review and approval



Messaging

	Identify and document any individuals who currently interact with messaging from Velonetic		
	Identify and document current processes that interact with and / or support existing messages		
	Review the final Blueprint Two technical specifications once confirmed, to establish how messaging is changing when mapped against your existing messages		
	Look out for updates on any minor variances to the published EDI messages		
	Find out if you currently use customised / transformed EDI messages and want to continue doing so, and whether these will be supported from phase one go live, once confirmed by Velonetic		
	Understand if you currently hold the data required to populate the MRC v3, if required		
	Identify and work through any data gaps or changes to processes / templates to populate the MRC $\nu 3$, if required		
	If existing customised messages will no longer be supported, work with your IT team and / or service provider to compare the structure, format and content of existing messages against the new specifications		
	Establish the cost and resources required to move to standard EDI equivalents for phase one go live		
	Document the changes required to the existing processes in your impact assessment tool and change plan after establishing the changes that impact messaging		
	If you need to make updates to your messages / automated process / robotics technology , work with your IT team / service provider to make the required updates		
	Identify all data that is collected and how it is collected (i.e., whether it is manual or automated)		
L	For manual data collection ; work with your IT team / service provider to update to the new file collection locations		
	For automated data collection ; work with your IT team / service provider to ensure changes are made to support ongoing auto collection from the new location		

Market gateway

	Look out for updates on when you will be provided with new credentials and able to connect to the market gateway (ASG Adept), which will be ahead of customer testing to ensure firms are ready in time		
L		Share the credentials with your IT team or service provider, who are responsible for reconfiguring your systems and testing the new gateway	
		Ensure your IT team / service provider implements new security authentication processes ahead of phase one go-live	



New digital market services



	Understand which portals / applications will no longer be available, the functionality these portals / applications currently provide and what replaces them
	Identify and document current processes that interact with or support these existing portals
	Identify and document the individuals who currently log onto the existing premium or claims portals / applications
	Identify an administrator who will create new users, secure log in credentials and manage new users / leavers prior to go live
	Establish if your internal systems interact with any of the portals / applications that will no longer be available. Document the changes and inform your IT / service providers
L	The IPOS & ICOS screens will not be available until March 2024. However, screenshots of the buil will be provided in advance to the market, to analyse and document any IT systems changes required
	In the case that you need to make updates to your existing systems, work with your IT team / service provider to make the required updates
	Document the changes required to the existing portal / application processes and update any user manuals and record these changes in your impact assessment tool and change plan
	Obtain log in credentials for the new IPOS and ICOS portals once available from Velonetic
	Review your own security specifications and work with your IT team and / or service provider to ensure that users can access the new portals
П	Upskill users who will be using the new digital market services by ensuring they access the training

Reporting

List the reports you currently receive and document collection method, recipients and how the reports are used
Distinguish which existing reports will or won't be used post go-live and assign a report owner(s) for each report tha will continue to be used
Identify where your reports are currently sent to or collected from and define how this process will be updated post go-live
Understand whether there is an automated process that feeds your report data into other databases, as you may need to pull the raw data in different ways to continue the process
Assess and define any changes that will need to be made to existing systems when replaced by self-service reporting
In the case that you need to make updates to your existing systems work with your IT team / service provider to make the required updates
Identify current report owners that will need to access the Qlik Sense tool to download new reports, and who may require training to set up reporting
Provide reporting owners with upskilling by reading the Qlik Sense training pack once available from Velonetic
There will be some rationalisation of language for reporting so look out for details of these changes from Velonetic



Customer testing

Identify a test lead who will be responsible for leading the testing efforts and the individuals who will support with test execution
Define the overall strategy and approach for testing
Develop detailed test plans for testing the four core market processes including test cases, scenarios, schedules and resource requirements
Gain an understanding of the detailed test process and how queries / defects are submitted to Velonetic via their online tool for resolution
Deliver training sessions for those who will be involved in testing
Coordinate with your IT/DevOps teams or service provider to allocate and set up test environments
Where possible, prepare test data sets that cover various scenarios, and verify that all testing documents are complete
Obtain log in details to the Velonetic test environments
Work with your IT/Dev Op team or service provider to perform a readiness check ensuring the test environment is set up
In Q2 2024, your IT/DevOps or service provider should be able to execute test cases and scenarios according to the established test plans, which should cover the IPOS/ICOS portals, connection to the market gateway (ASG Adept) and messaging within the context of various market processes
Utilise the online system to log and report any identified defects or issues and if required, perform regression testing after fixes and changes, to ensure the updates haven't introduced new issues
Keep stakeholders informed of testing progress, challenges and adjustments and once the final test reports have been prepared, conduct a test completion meeting to obtain sign-off from your project sponsors / adoption lead

