**Ivernia Project Sequencing**

v1 - 21st July 2023

**Key**

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| APPLIED RISKHANDLER ACTIVITY |
| APPLIED HOME ACTIVITY |
| IVERNIA ACTIVITY |

**Phases of work**

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| **Progress** | **Phase of work** |
|  | * Establish the question set for the product on Riskhandler |
|  | * + Assess Ivernia received specification. |
|  | * + Extract from that specification: |
|  | * + - The question set for the product, |
|  | * + - The rating steps and logic, |
|  | * + - The rating tables. |
|  | * + Clarify and refine with Ivernia where anything is unclear, there are gaps, we have recommendations |
|  | * Build an empty UAT instance of Riskhandler |
|  | * + It will be hosted at “iverniatest.riskhandler.com” |
|  | * + This is where your new product will be constructed by Riskhandler and where you will test and ultimately sign off for go-live |
|  | * Present to Ivernia a draft 1 functioning data capture on Riskhandler |
|  | * + The functionality at this stage will be restricted only to the question set. |
|  | * + There will be no quoting, documents etc available |
|  | * Short training session for Ivernia |
|  | * + Logging in, creating users, starting quotes on Riskhandler   + We won’t progress beyond starting a quote and working through the question set |
|  | * Question set testing and sign-off by Ivernia |
|  | * + Ivernia to test the data capture question set |
|  | * + Only the question set will be available for testing at this stage |
|  | * + No quotes, documents or other functionality will be available |
|  | * + Ivernia and Riskhandler to refine and re-test the question set until it is agreed that it is complete and correct – at which point Ivernia will sign-off on that stage of the build. |
|  | * + This testing and sign-off before other functionality exists is very important because the question set is the foundation for the rest of the product’s functionality. The rating routine, the document generation, any reporting and API documentation are all built on top of that question set data. Therefore, any requests to change that data capture later in the project would result in re-work of the items above, which causes delay. So that’s why we stop, test and sign-off on the question set as a break point in the project. |
|  | * Ivernia to provide document specifications for |
|  | * + Statement of Fact, Schedule, Indemnity Letter |
|  | * Ivernia to provide static PDF files for |
|  | * + IPID, Policy Wording |
|  | * Build rating and deploy to UAT |
|  | * Build Lexis Nexis peril checking and deploy to UAT |
|  | * Build policy document generation and deploy to UAT. The following will be built. |
|  | * Build the data export API and deploy to UAT |
|  | * + Produce API documentation including API end point, connection methodology, data payload specification |
|  | * + Provide credentials, API key for connection |
|  | * Build transacted business report (a starter MI report) to UAT |
|  | * Training session for Ivernia (UAT) |
|  | * + Setting up Chill as a broker. User access. Commissions. Etc   + How to perform quotes, deal with referrals, use accounting (if that’s the chosen option)   + Write and manage system rules for referring, endorsing   + Endorsement library maintenance |
|  | * Ivernia testing begins of the complete home product functionality on Riskhandler |
|  | * + New business, MTA, Referral, Cancellation, VOID/NTU |
|  | * + Risk acceptance rules for go live |
|  | * + Endorsement wordings and rules for go-live |
|  | * + Generated document output |
|  | * + Rating |
|  | * Ivernia to provide all text notes that need to appear inside Applied Home at quote time |
|  | * + Policy benefits (selling points), security requirements, assumptions as quote time on Applied etc |
|  | * Build the Applied Home integration endpoint |
|  | * Applied Home scheme build for Ivernia product starts |
|  | * Applied delivers a Home UAT build to Riskhandler for testing |
|  | * Riskhander to test and refine the Applied Home UAT product integration |
|  | * Riskhandler hands over UAT testing to Ivernia (end-to-end solution) |
|  | * Ivernia begins testing of end-to-end UAT |
|  | * + Quote and buy journey from data entry into Applied home, through quoting on Applied, through the riskhandler hosted buy journey, through referral where needed, through binding cover, to ending with a policy record and documents created inside Applied Home. |
|  | * Riskhandler readies production environment |
|  | * UAT is refined within the Applied Home testing window |
|  | * + Note that there is very limited scope for changes here. We must confirm to the Applied Home monthly release cycle. Hence the importance of building, testing and signing off in advance, the Riskhandler BACK END.   + Changes here will be restricted to faults found in the integration between Riskhandler and Applied home at this stage |
|  | * Ivernia signs-off for go-live of both Applied Riskhandler and Applied Home |
|  | * GO LIVE ON APPLIED HOME AT MONTHLY RELEASE CYCLE DATE |