

Duck Creek

DC Binds Policy

Fast Flow or Manually

We need to get more details on all the steps involved in each DC transaction and sequence them all out so we can see where PMS will fit into the process

Policy Admin successfully marks policy as in-force within DC

Policy Admin publishes policy data to ESB (PMSPolicyBIND)

1) Call ESB (DCxml)

8) ESB Response

Synchronous Call

Integration to PMS will be a synchronous call where we know if the data has successfully made it to the EPF. Since Mini & Overnight batch can not be called in real-time writing to the EPF is as low as we can go

ESB

PMSPolicyBIND
Publisher

PMSPolicyBIND
Subscriber

2) Transform data

- Convert DCXML to DCMaster Format

- Call Mainframe CICS Gateway program

3) Call CICS (Flat DC Master)

7) CICS Response

Mainframe

CICS Gateway Program

4) Write to VSAM

DCMaster
(slim version of
BCMaster)

5) Call "Acceptance" program

6) "Acceptance" Response

CICS "Acceptance" Program

Support Data Files

EQMaster

RQMaster

...

???

PMS

EPF

1) Online Mini-Batch (not able to be invoked real time)

2) Overnight Batch

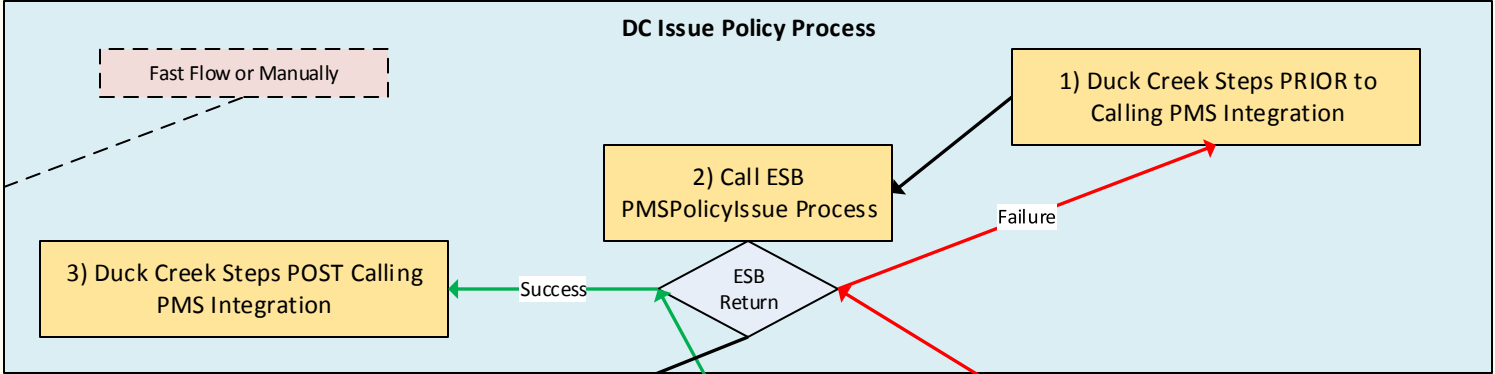
PIF

Duck Creek

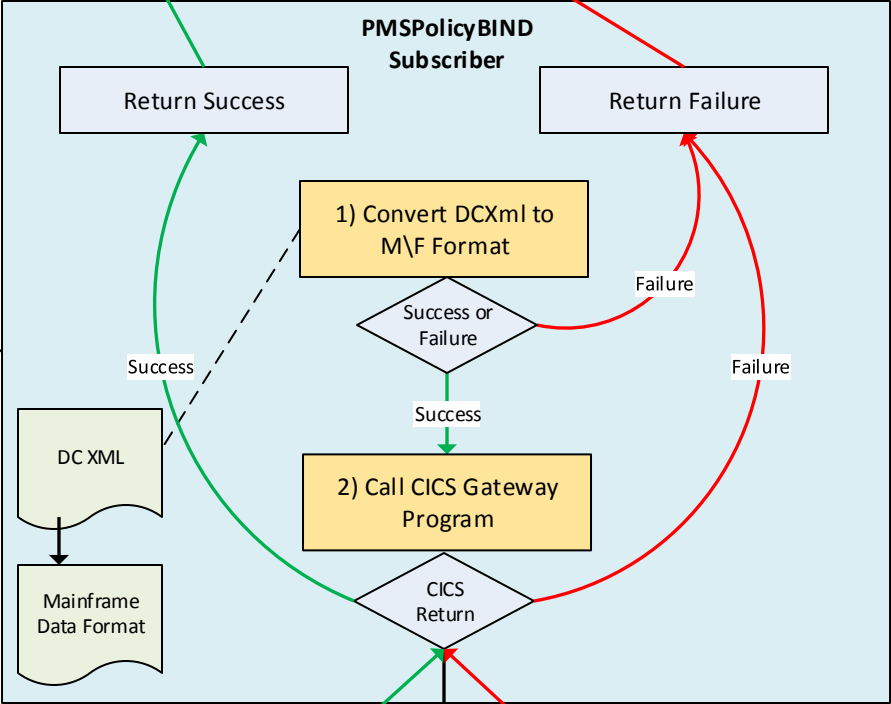
Synchronous Integration

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ESB

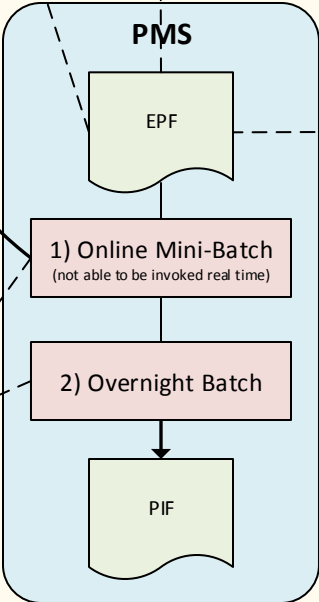
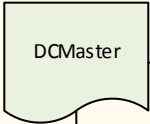


Mainframe

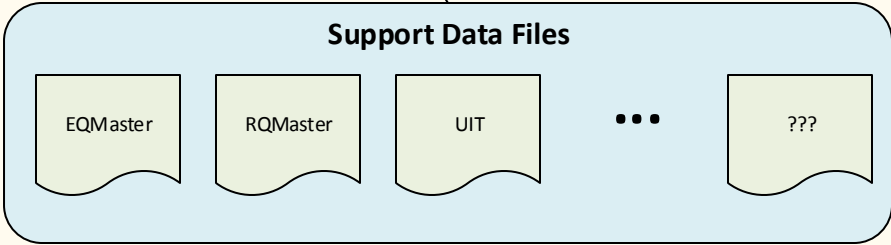
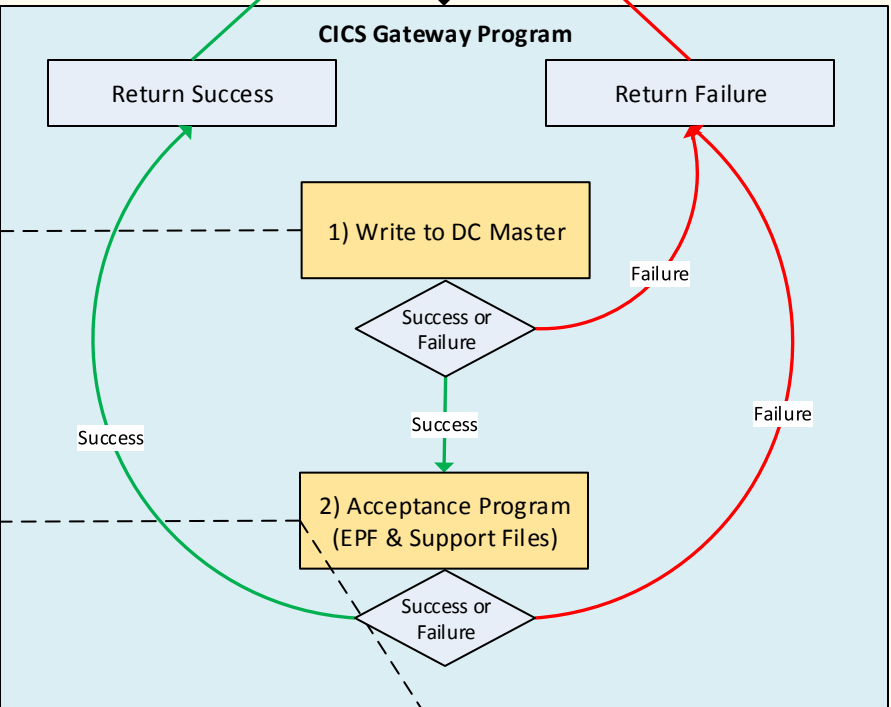
NOTE: Writing to the EPF is as far as we can go in a synchronous call



Email on Failures



NOTE: Mini-Overnight Batch errors will not be caught in the integration



PMS Policy Integration High Level Questions

High Level

- When can we get Common Product output? (We need to know fields\lines\coverage's that are going to be entered into DC)
- What PMS transactions need to be supported between DC & PMS? (New Business\Endorsements\Renewals\Reissue\Cancellation\“Unaccept”)
- Are we having individual CICS programs for each transaction or 1 for all?
- Is this a one-way or two-way integration?
 - Does DC need to know if downstream processing was a success or failure? Or, do they assume everything works everytime?
- Do we need to deal with multi-endorsements in the same day?
- What kind of reconciliation do we need to do between DC and PMS?
 - Policy counts? Premium (Policy\Line\Coverage)?
- When will data be transferred to PMS? Real-time or batch?
- What changes (data\logic) need to occur to allow for this transfer?
- How will renewals be handled between the various legacy systems into DC? (Particularly with NGIC)
- Do the policies need to make their way to Market Reservation to be cleared against? Do they need to appear in the Policy Inquiry function?
- Are there any potential differences in the handling if a policy is account fast-flow vs manual?
- Do we need to account for multiple policies (ie Auto in Lincq\CLIPS) in this process? Do they need to be linked?
- What is the PCO for all entities?
- What are the policy numbers specific for DC & PMS?
- How are agency numbers going to be handled?
- What is the format of the DCMaster File? How different is this from the other master files? When can it be confirmed?
 - Can we simply start now with the necessary fields for PMS and go from there? What are these fields?
- What is the format of the DCXml? When can it be confirmed?
- What transactionkey\quotekey would we use to link the DCMaster data to DC Data? (Not Policy Key)
- How are errors going to be dealt with at each failure point?
 - Calling ESB; Mapping inside ESB; Calling MF; DCMaster Acceptance; Mini-Batch; Over-Night Cycle
- How will we deal with the fact that the mainframe is unavailable between 23:00-06:00?
- Are we getting into reliable delivery within the ESB?
- Are any changes required to PMS to account for modifications to the existing Federated\Warehouse\Billing\Claims\Reporting systems?
- Do we need to retain legacy policy numbers in PMS? Or DC Master?

Key Assumptions to be Confirmed

- Integration built for Small Business only and not built to handle long-term DC policy processing
 - Any requirements that only matter to other markets no not apply. PMS reliance should be removed by this time.
- No Reinsurance
- No Subscription
- No Worksheet
- No Accumulation
- Reporting (Mgmt\Financial\Regulatory) will be done via existing methods
- No Tokio (but we really should be prepared for Tokio to come on board)

Claims Integration High Level Questions

High Level

- What specific data elements does DC need for Claims?
 - For Rating; For Automated Renewals; For U\W display
 - Where does all this data currently reside? (CPLUS; PMS; Other?)
 - Is there any logic that needs to happen to transform data before getting to DC?
- Are there any claims fields that need to be permanently stored in DC or is all info required for reference only?
- What is the plan for historical Claims information? (NGIC vs Federated)
 - How will Policy Numbers come into play?
 - If not required, how are the underwriters supposed to deal with this in the real world?
- What changes to CPLUS need to occur to account for NGIC\NGIC from DC\Federated\Zenith policies? (New fields\New Screens\New Logic)
- How will a user know a policy is from which entity?
 - Are there any differences in processing from one entity to another?
- Do we need to change anything in the CPLUS\PMS APPC Connection programs?
- What documents are produced from the CPLUS system?
 - Letters; Cheques; Reports; etc?
 - What exact changes are required to these? (NGIC\NGIC from DC\Federated\Zenith)
- Are there any changes required to support the brokers?
- Are there any changes required to support the insured?
- Is the NB Claims Inquiry function still meant to handle all DC policies?

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- Environment Remediation needs to occur (QA\UAT)

Billing Integration High Level Questions

High Level

- What methods of payment are going to be offered?
- Does DC need anything directly from the billing system?
- How will billing account numbers work?
 - Existing clients (NGIC\Federated\Zenith)
- What documents are produced from the CPLUS system?
 - Letters; Cheques; Reports; etc?
 - What exact changes are required to these? (NGIC\NGIC from DC\Federated\Zenith)
- Are there any changes required to support the brokers?
- Are there any changes required to support the insured?
- How are the changes that are going on as part of the Billing project come into play with this integration?

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- No Subscription
- No Worksheet
- No Accumulation
- Reporting (Mgmt\Financial\Regulatory) will be done via existing methods

Warehouse\Reporting Integration High Level Questions

High level

- Does the NGIC warehouse now need to contain the DC Federated\Zenith data?
- How will Zenith\Federated consolidate all their data into one place? (Policy\Claims\Billing)
- What set of reports are absolutely mandatory to keep the business running?
 - What data is required to produce these reports?
 - Where does all this data come from? (Particularly data that is NOT in PMS)
 - How do we deal with data that is required for reports, but may not be captured in DC?
- How is all the different company data going to be routed? Where does it all need to go?
- What are the new data feeds that need to be created?
- What are the existing data feeds that need to be modified?
- How do we make sure that reports that are not required still work after all this new data is moved around?
- Duck Creek is going to hold policies that are NOT part of the Small Business segment. How does that affect reporting?
- What changes need to happen in the warehouses to support this process?

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- Reporting (Mgmt\Financial\Regulatory) will be done via existing methods