

AIM UPGRADE CHECKLIST

TEMPLATE

UNDERWRITING OPERATIONS:

- Quote
 - Rackley Integration
 - Imageright integration
 - Property Upload
 - Submit to Market
 - Forms and Documents
 - Tax Calculator
 - Units at Risk Screens
 - Custom and/or Unique Processes
 - Existing issues or 'pain'
- Bind/Invoice
 - Contract Participation
 - Agency Bill
 - Direct Bill
 - Installment Bill
 - Forms and Documents
 - Custom Invoice
 - Custom and/or Unique Processes
 - Existing issues or 'pain'
- Endorsement
 - Custom forms or documents
 - Update data from endorsement tabs performs as expected
 - Custom and/or Unique Processes
 - Existing issues or 'pain'
- Cancellation Workflow Including Notice
 - Cancellation Notice
 - Rescind
 - Cancel Policy/invoice
 - Reinstate/invoice
 - Existing issues or 'pain'
- Supporting Processes
 - Phone Book
 - Interview agency to determine how many supporting processes are used, list them and determine any customizations to support the workflow.
 - Existing issues or 'pain'

UNDERWRITING OPERATIONS (cont):

- Reports
 - Production Reports
 - Report Manger Reports
 - Crystal Reports
 - Existing issues or 'pain'
- Documents
 - Document Designer
 - Word Merge
 - Crystal Documents
 - Custom
 - Existing issues or 'pain'
- Policy Issuance
 - Word Merge
 - Docuparser (has own bullet point)
 - Verify selection of endorsements work as expected
 - Verify file imports without error
 - Custom and/or Unique processes
 - Existing issues or 'pain'

ACCOUNTING OPERATIONS:

- Journal Entries
- Accounts Receivable
 - Vouchers
 - Down payments
 - Commissions
 - Unapplied payments
 - Cash
 - Void cash receipt
 - Offsets
 - Write-offs
 - Existing issues or 'pain'

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Experience in one office may vary from experience in another office.*

ACCOUNTING OPERATIONS (cont):

- Accounts Payable
 - Vouchers
 - Pay carrier
 - Refund premium
 - Pay vendor
 - Pay taxes
 - Pay claims
 - Void checks
 - Apply offsets
 - Write off
 - Direct Funding
 - Cash Receipts
 - Existing issues or 'pain'
- Direct Bill Upload Processes
 - Get details on current process and how to run this
 - Pre-test and report all issues
 - Existing issues or 'pain'
- Supporting Processes
 - Phone Book
 - Year End Processes
 - Update Periods
 - Lookups
 - Existing issues or 'pain'
- Reports
 - System Reports
 - Report Manager Reports
 - Crystal Reports
 - Custom Reports
 - Existing issues or 'pain'

DOCUPARSER

- Update a library
- Add/Edit Library
- Change default forms
- Change library and field properties
- Existing issues or 'pain'

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CLAIMS

- Entering claimants/claims
- Add/Edit reserves
- Add/Edit payments
- Void payment
- Close claim
- Supporting processes (phone book)
- Reports
- Existing issues or 'pain'

EIM

- Reports
- Existing issues or 'pain'

PROCESS MANAGER

- Processes
- Reports
- Existing issues or 'pain'

DATA MAINTENANCE UTILITY

- Add/Edit/Suspend/Delete/Reinstate User
- Exercise all options on a Company
- Exercise all options on a Producer
- Exercise all options on a Coverage
- Exercise all options on a Product
- Exercise all options on Lookup Tables
- Interview executive users to determine which other features in DMU need any vigorous testing. Depends on configuration needs of the MGA

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CUSTOM PROCESSES

- Bordereaux
- Third Party Integration
- Carrier Direct Upload or Integration
- Existing issues or 'pain'

NOTES

- Lloyd's programs
- Primary focus of business
 - o Lines of business
 - o Mix of brokerage vs contract
- Distinctions of client
 - o Specialty programs
 - o Distinctive service standards
 - o Unique relationships
 - Carrier relationships
 - Association/group relationships
 - Regulatory authority relationships
- Tax challenges
 - o Municipal tax workflow
 - o State specific requirements
 - o Reports and forms
 - o Integrations
 - o Workflows

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