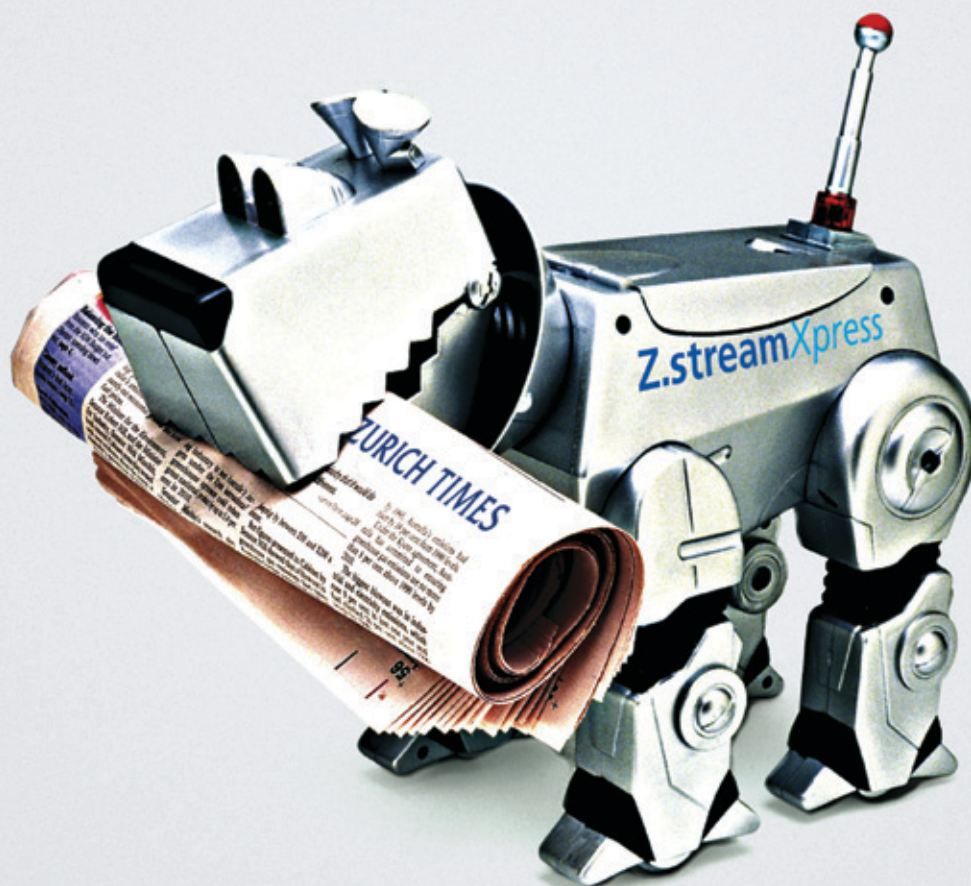


Z.streamXpress – Renewals Work Instructions

Broker Reference Guide



Z.streamXpress

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1. Document Purpose

The purpose of this document is to define the work instructions on using ZStreamXpress for the processing of renewals.

2. Renewal Functionality

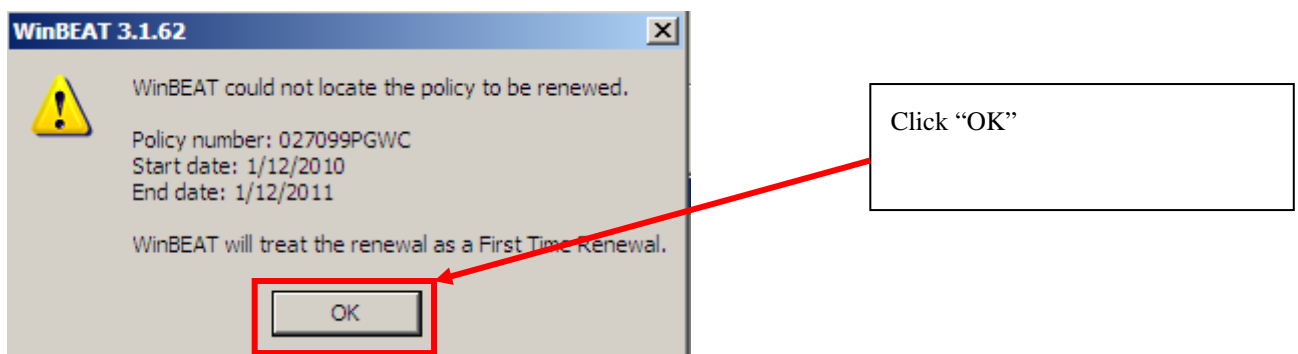
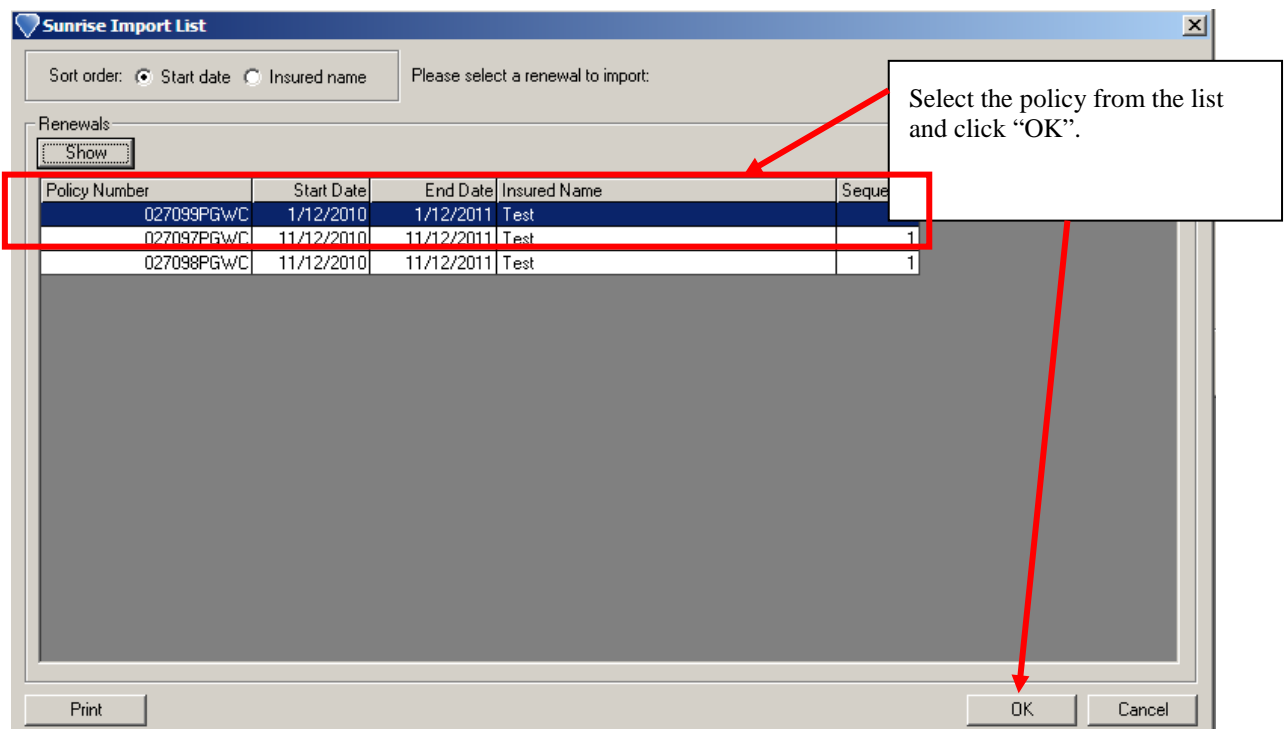
Renewal is a function available within ZStreamXpress that allows users (both internal and Brokers) to review, accept or decline the next term of a policy.

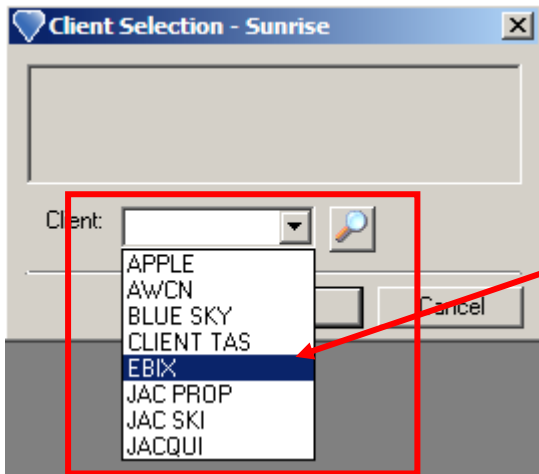
The steps in this document are looking at the process from a Broker's view. We have selected Winbeat as a starting point so as users have an understanding of how the Broker Management System (in this example Winbeat) interacts with ZstreamXpress and the Renewal process.

2.1 Workers Compensation Screen Shot Example

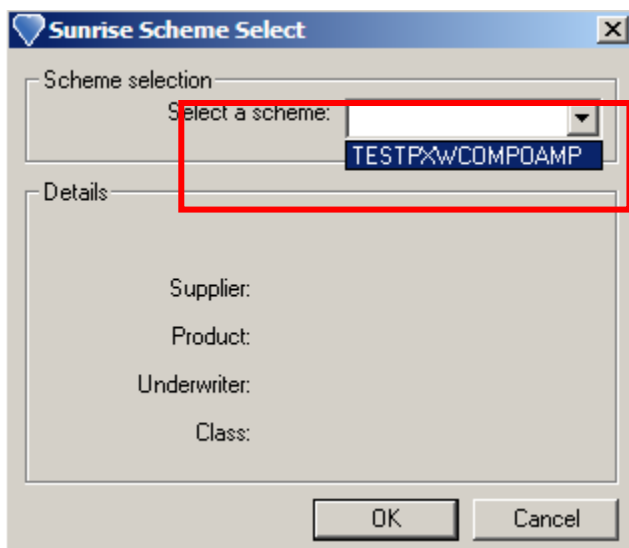
The following is an example of how of how a Broker is able to transact a renewal from the Winbeat system.

It is important to note that when a renewal is 'new' (this can be either the first time the renewal is available to the Broker on eBix or if Zurich have sent it back to eBix) the renewal will be in the IMPORT section of eBix.





Select the client code and click "OK"



Select the product and click "OK".

Review the Client details vs Insured details by clicking between the tabs in this screen. Then, answer Yes or No based on whether you wish to apply the details from the Client screen to the Insured details screen for this policy.

Note: the client details come from the master client in the broking system.

Client details have changed. Do you wish to update the insured with these details? Darko Andriesci (ebix00011)

Yes No

Client Insured

Client details

Company Details

Legal Entity Name	EBIX Australia Pty Ltd	Trading as	
ABN			
ACN [?]			
State business register number			
State of registry			
WCN			<input type="button" value="Add"/>
ITC (%)	100		

Mailing Address	Business Address
Unit / Floor / Building / PO Box	Suite 7
Street Number	670
Street Name	Canterbury Road
Suburb / Postcode Search	Suburb / Postcode Search
Suburb	SURREY HILLS
State	VIC
Postcode	3127

Contact Details

Contact name	Business
Email address	Private
Website	Fax
	(03) 9898-7811

If you say yes to updating the insurers system, you will get an additional confirmation screen, if you say no, it will be launched into the insurers screen, for Zurich this is Xpress.

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]

File Enquiries Invoice Compliance Bank Claims Reports Maintain Sunrise Window Help

Back Enquiry Transactions Receipts Maintain Print Reminders Log Off Exit Exit Sunrise

Workers Compensation 027099PGWC Renewal Import Invitation

Darko Andrieski (ebix00010) Save Exit ZURICH®

Business Details

Insured name EBIX Australia Pty Ltd
 Account* 2016444
 Stamp duty exempt? No

Business details

Year of establishment* 2010
 State TAS
 Client description of business* 027099PGWC

Occupation details

No.	ANZSIC	Industry	Est. emps	Est.
1	15201	Other mining services - offshore		1

Claims experience

Have you made any claims in the last 5 years?* No
 Claims details valid as of 01/12/2010

Inception Date	Expiry Date	No. Employees	Actual wages	No. Claims	Cims paid	Outstanding	Large Loss No. Cims	Large Lc

< Previous Calculate Add Comment Add Referral Next >

2.11.2

Review details and make updates, if necessary. Click "Next".

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]

File Enquiries Invoice Compliance Bank Claims Reports Maintain Sunrise Window Help

Back Enquiry Transactions Receipts Maintain Print Reminders Log Off Exit Exit Sunrise

Workers Compensation 027099PGWC Renewal Import Invitation

Darko Andrieski (ebix00010) Save Exit ZURICH®

Extensions To Cover

Type	Description	No. of workers	Loading (%)	Amount (\$)	Applied loading	No. members	Status

Commission consideration

Net Rate

Version

Class	Rate	Base Premium	GST	Stamp
ANZSIC (15201)	8.02%	\$1,500.00	\$150.00	
Total	8.02%	\$1,500.00	\$150.00	

< Previous Calculate Next >

2.11.2

Review details and make updates, if necessary. Click "Next".

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]

File Enquiries Invoice Compliance Bank Claims Reports Maintain Sunrise Window Help

Back Enquiry Transactions Receipts Maintain Print Reminders Log Off Exit Exit Sunrise

Workers Compensation 027099PGWC Renewal Import Invitation Darko Andrieski (ebix00010) Save Exit ZURICH®

Insured Details

Insured Details on Policy

Client Ref EBIX

Company Details

ABN Search ABR [Advanced ABR Search](#) [ASIC Search](#)

Insured name* EBIX Australia Pty Ltd Trading as

ABN

ACN

State business register number

State of registry

ITC (%) 100

Same as mailing

Mailing Address

Unit / Floor / Building / PO Box PO Box 203

Street number

Street name

Suburb / Postcode Search Enter search criteria...

Suburb SURREY HILLS

State VIC

Postcode 3127

Business Address

Unit / Floor / Building Suite 7

Street number 670

Street name Canterbury Road

Suburb / Postcode Search Enter search criteria...

Suburb SURREY HILLS

State VIC

Postcode 3127

< Previous Validate Next >

2.11.2

Review details and make updates, if necessary. Click "Next".

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]

File Enquiries Invoice Compliance Bank Claims Reports Maintain Sunrise Window Help

Back Enquiry Transactions Receipts Maintain Print Reminders Log Off Exit Exit Sunrise

Workers Compensation 027099PGWC Renewal Import Invitation Darko Andrieski (ebix00010) Save Exit ZURICH®

Premium Summary

Premium summary

Selected quote option Conventional

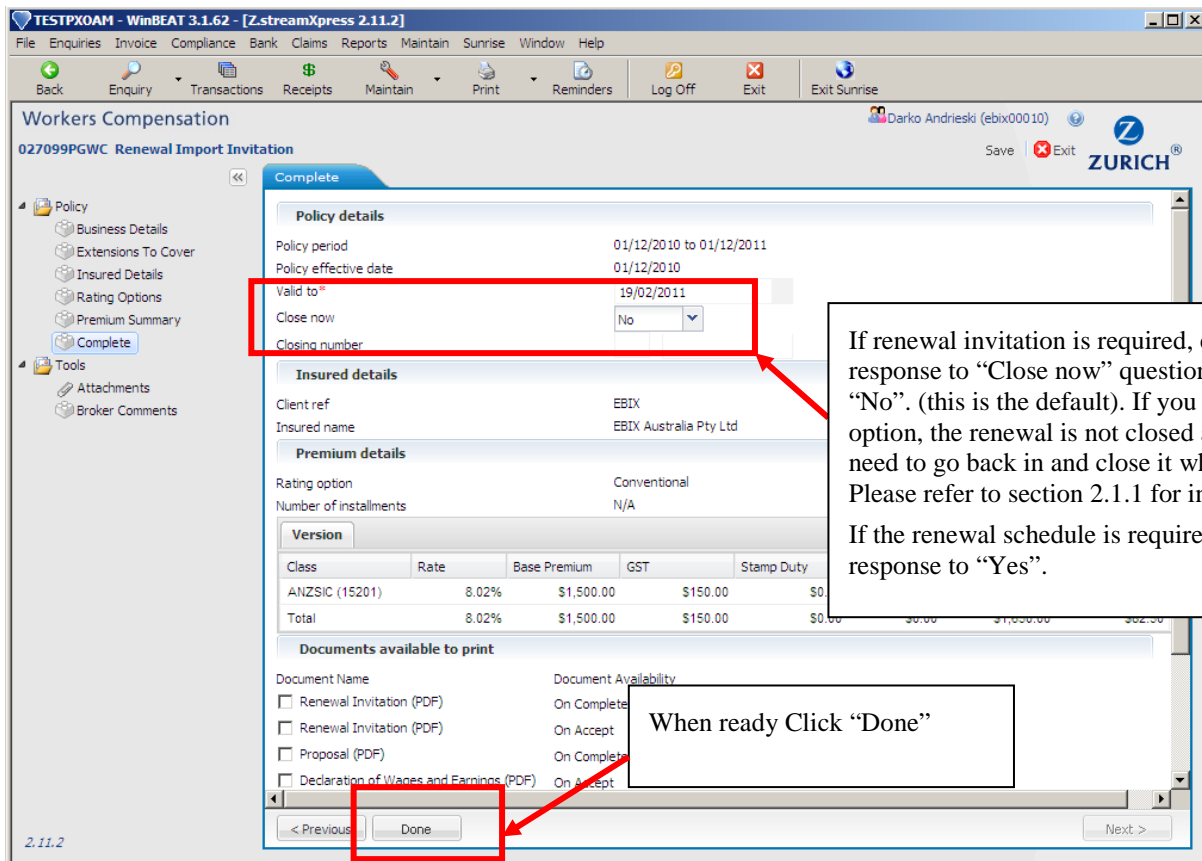
Version								
Class	Rate	Base Premium	GST	Stamp Duty	SGC	Total Payable	Commission	
ANZSIC (15201)	8.02%	\$1,500.00	\$150.00	\$0.00	\$0.00	\$1,650.00	\$82.50	
Total	8.02%	\$1,500.00	\$150.00	\$0.00	\$0.00	\$1,650.00	\$82.50	

Do you wish to pay by installments? No

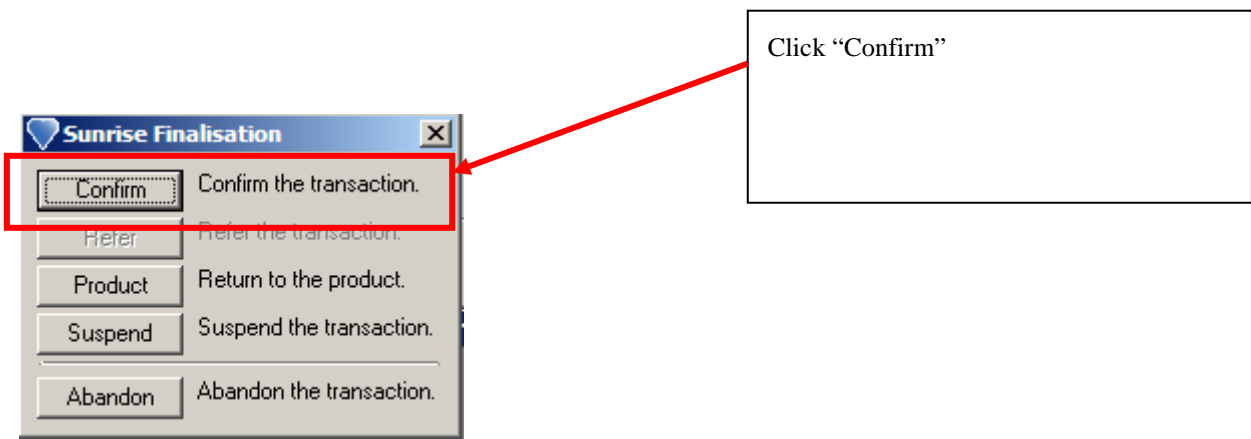
< Previous Next >

2.11.2

Review details and make updates, if necessary. Click "Next".



This will take the user back to their BMS (in our example the Winbeat system)



The renewal import has now been processed successfully.

2.1.1 How to close a renewal if “No” was selected to the “Close Now” question

To close a policy in renewal unclosed status (i.e. a renewal invitation):

The screenshot shows the WinBEAT 3.1.62 interface. At the top, the 'Transaction' dropdown menu is highlighted with a red box and contains the option 'Close'. Below this, the 'Client' section shows 'EBIX' selected in the client dropdown. A callout box with a white background and black text points to the 'Close' option and the 'EBIX' client dropdown, containing the following text: "Select Close transaction and Client code, then click “Show”. The renewal invitation should appear in the list. Select the policy and click “Process Transaction”." Below the callout, the 'Policies' section has a 'Show' button and radio buttons for 'All', 'Live', and 'Outstanding'. The 'Live' radio button is selected. Below the policies section is a table with columns: Class, Underwriter, Policy Number, Inc, and several columns of dates and amounts. The last row of the table is highlighted in blue. At the bottom of the interface, there are buttons for 'Process Transaction', 'Reset', and 'Close'.

Class	Underwriter	Policy Number	Inc					
Computer	ZUR	022174PGWC	2/0					
Computer	ZUR	022177PGWC	16/0					
Computer	ZUR	022240PGWC	17/0					
Computer	ZUR	022447PGWC	23/0					
Computer	ZUR	025108PGWC		1/09/2009	1/09/2010	Expired	\$5,236.00	\$5,236.00
Computer	ZUR	025110PGWC		1/09/2009	1/09/2010	Expired	\$1,463.00	\$1,463.00
Computer	ZUR	025565PGWC		8/10/2010	8/10/2011	Active	\$13,255.00	\$13,255.00
Computer	ZUR	027067PGWC		25/11/2010	25/11/2011	Active	\$4,930.56	\$4,930.56
Computer	ZUR	027066PGWC		11/11/2010	11/11/2011	Active	\$1,672.00	\$1,672.00
Computer	ZUR	2996196GWC		12/11/2010	12/11/2011	Active	\$16,522.00	\$16,522.00
Computer	ZUR	027099PGWC		1/12/2010	1/12/2011	Active	\$1,672.00	\$1,672.00

ZstreamXpress is then launched.

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]

File Enquiries Invoice Compliance Bank Claims Reports Maintain Sunrise Window Help

Back Enquiry Transactions Receipts Maintain Print Reminders Log Off Exit Exit Sunrise

Workers Compensation
027099PGWC Renewal Import

Darko Andrieski (ebix00010) Save Exit ZURICH

Business Details

Insured name: Test
Account*: 2016444
Stamp duty exempt?: No

Business details

Year of establishment*: 2010
State: TAS
Client description of business*: 027096PGWC

Occupation details

No.	ANZSIC	Industry	Est. emps	Est. wages (\$)	Sub Contractor Wages...	Total Est. Wag
1	15201	Other mining services - offshore	1	\$16,392	\$0	\$1

Add occupation Delete occupation

Claims experience

Have you made any claims in the last 5 years?*: No
Claims details valid as of: 01/12/2010

Inception Date	Expiry Date	No. Employees	Actual wages	No. Claims	Clms paid	Outstanding	Large Loss No. Clms	Large Lc

< Previous Calculate Add Comment Add Referral Next >

2.11.2

At this point, the user is in the policy information. Using the navigation tree, select "Complete" to skip over the other screens and proceed to close.

Complete

Policy details

Policy period: 01/12/2010 to 01/12/2010
 Policy effective date: 01/12/2010
 Valid to*: 20/02/2011
 Closing number: [] []

Insured details

Client ref: EBIX
 Insured name: Test

Premium details

Rating option: Conventional
 Number of installments: N/A

Version									
Class	Rate	Base Premium	GST	Stamp Duty	SGC	Total Payable	Commission		
ANZSIC (15201)		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	8.02%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Documents available to print

Document Name	Document Availability
<input type="checkbox"/> Certificate of Currency (PDF) <small>customise...</small>	On Accept
<input type="checkbox"/> Proposal (PDF)	On Complete
<input checked="" type="checkbox"/> Renewal Schedule (PDF)	On Accept
<input type="checkbox"/> Deduction of Wages and Earnings (PDF)	On Accept

< Previous Done Next >

Select Renewal Schedule PDF, if required, and click on "Done" button to complete the closing.

Sunrise Finalisation

Confirm Confirm the transaction.

Refer Refer the transaction.

Product Return to the product.

Suspend Suspend the transaction.

Abandon Abandon the transaction.

Back in the Broker Management System, eg Winbeat, Click the "Confirm" button to finalise the transaction.

The renewal import has now been successfully closed and the policy is renewed.

2.1.2 How to complete wage adjustments for a renewal

The following steps are if the estimated wages that were imported into the renewal need to be adjusted:

Once policy is open, in Business Details, double click on the occupation line.

No.	ANZSIC	Industry	Est. emps	Est. wages (\$)	Sub Contractor Wages...	Total Est. Wages (\$)
1	61100	Road Freight Transport	1	\$65,000	\$0	\$65,000

Update the Estimated Wages and no. of employees as required.

Update any other required details such as occupation questions or sub contractors.

Click 'Save'

Contract Type	Estimated Remuneration (\$)	Labour (%)
Labour only		
Labour & Plant		
Labour & Materials		
Labour, Plant & Materials		

The Business Details page will be updated in Est. wages \$ field.
Total Est. Wages \$ field will have old figure until you click "Calculate"

Click "Calculate"

2.13.1

Both the Est. wages \$ field and the Total Est. Wages \$ field will have the new updated figure.

2.13.1

Using the left navigation tree, click "Complete" and check all details

If renewal invitation is required, ensure response to "Close now" question remains as "No". (this is the default). If you choose this option, the renewal is not closed and you will need to go back in and close it when ready. Please refer to section 2.1.1 for instructions. If the renewal schedule is required change the response to "Yes".

When ready Click "Done"

2.13.1

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