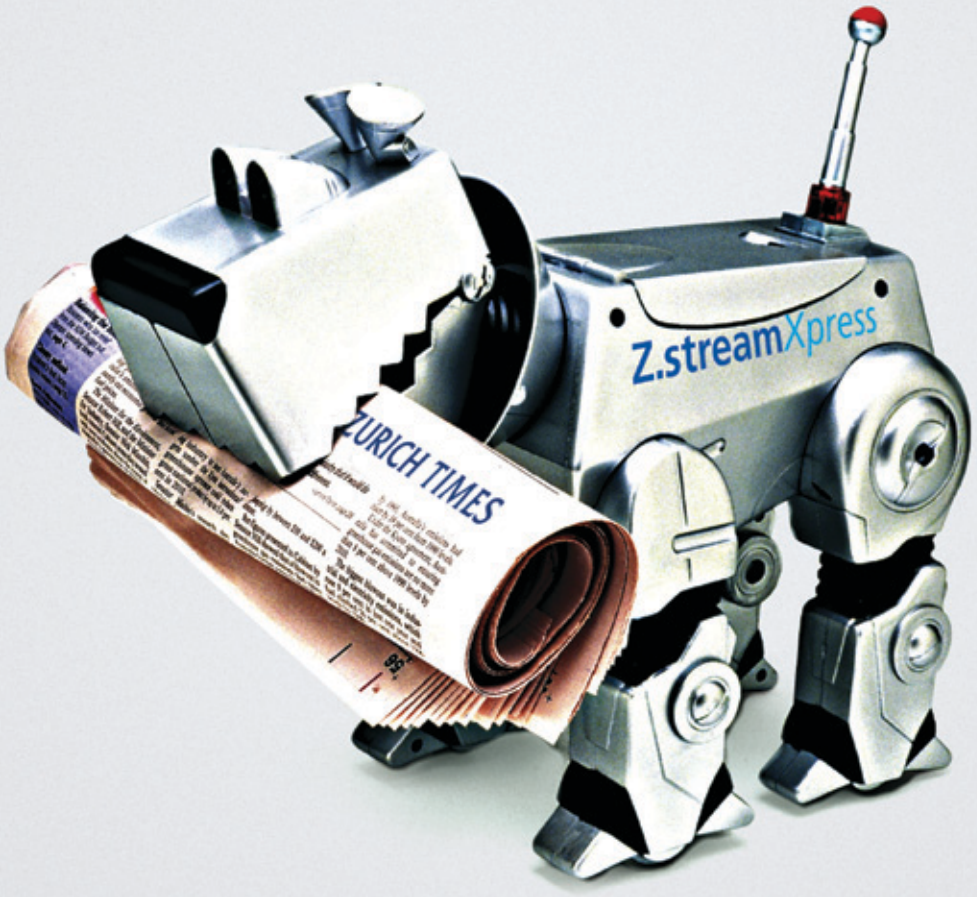
ZURICH

Z.stream*Xpress*
– Renewals Work Instructions

Broker Reference Guide



Z.stream*Xpress*

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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

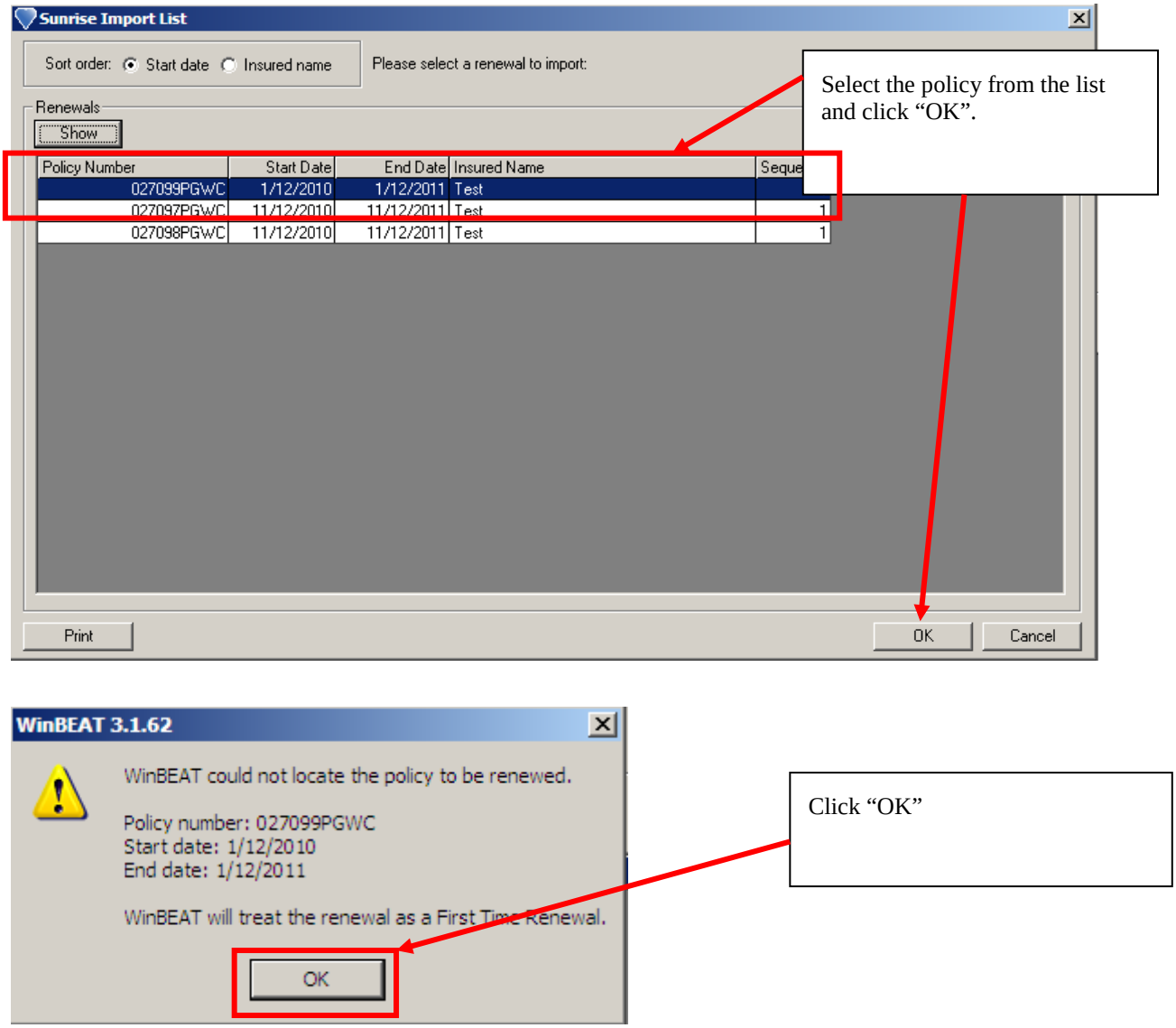
Renewal is a function available within ZStreamXpress that allows users (both internal and Brokers) to review, accept or decline the next term of a policy.

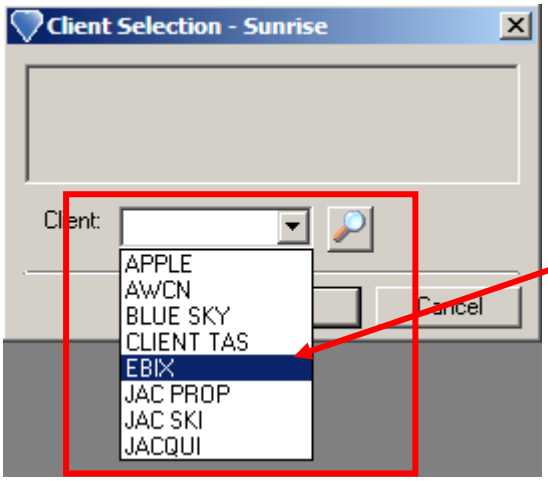
The steps in this document are looking at the process from a Broker's view. We have selected Winbeat as a starting point so as users have an understanding of how the Broker Management System (in this example Winbeat) interacts with ZstreamXpress and the Renewal process.

2.1 Workers Compensation Screen Shot Example

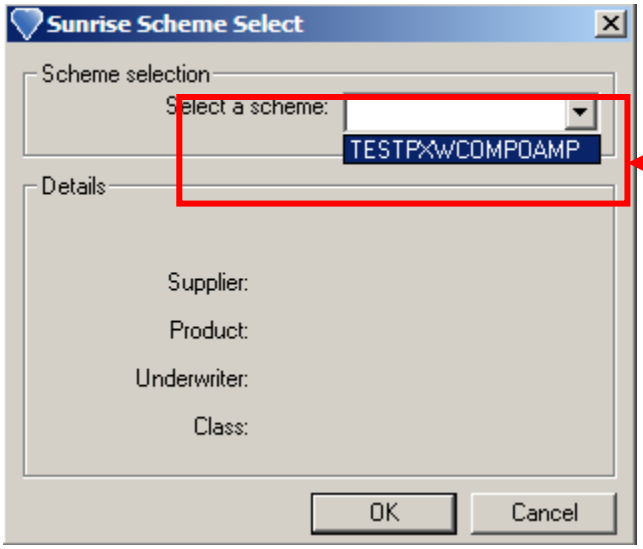
The following is an example of how of how a Broker is able to transact a renewal from the Winbeat system.

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.





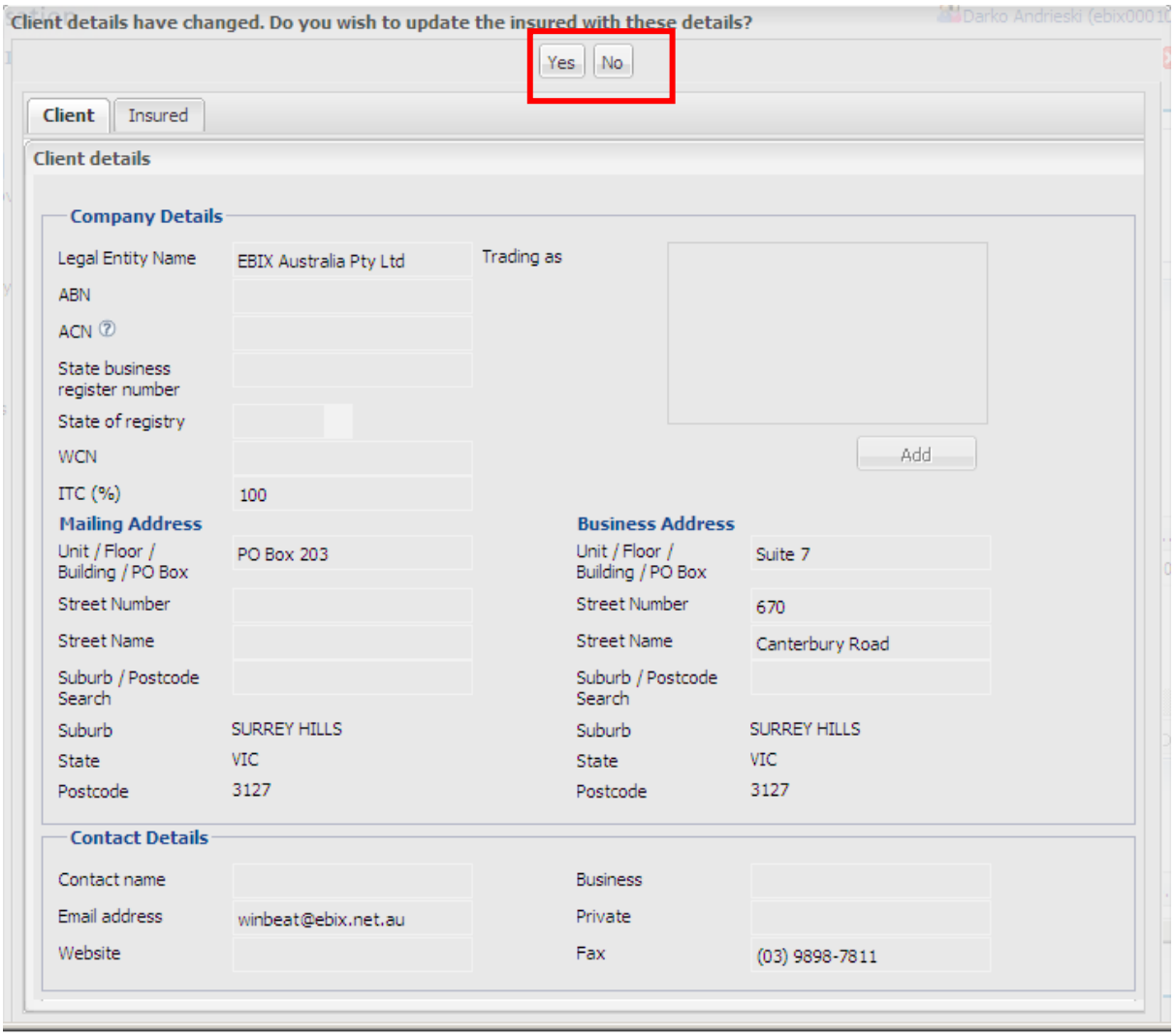
Select the client code and click “OK”



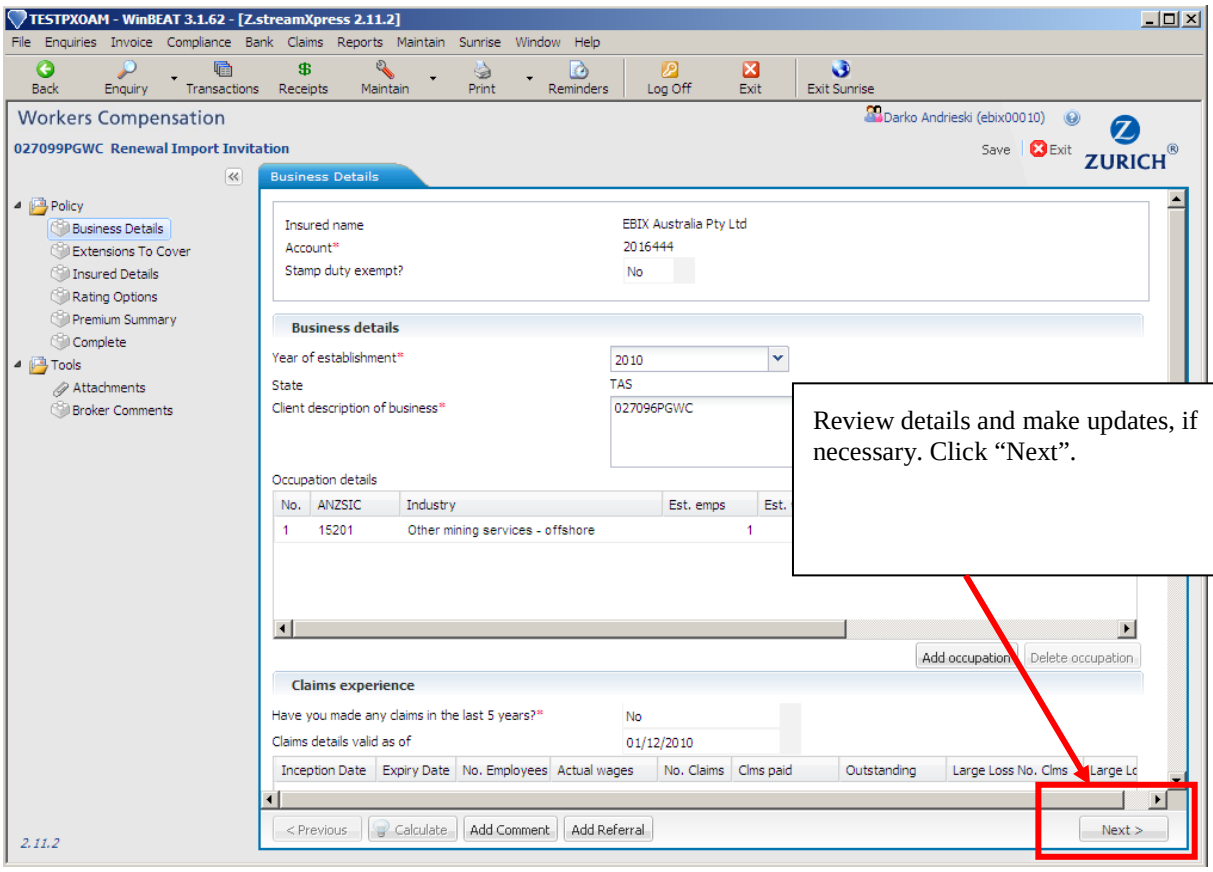
Select the product and click “OK”.

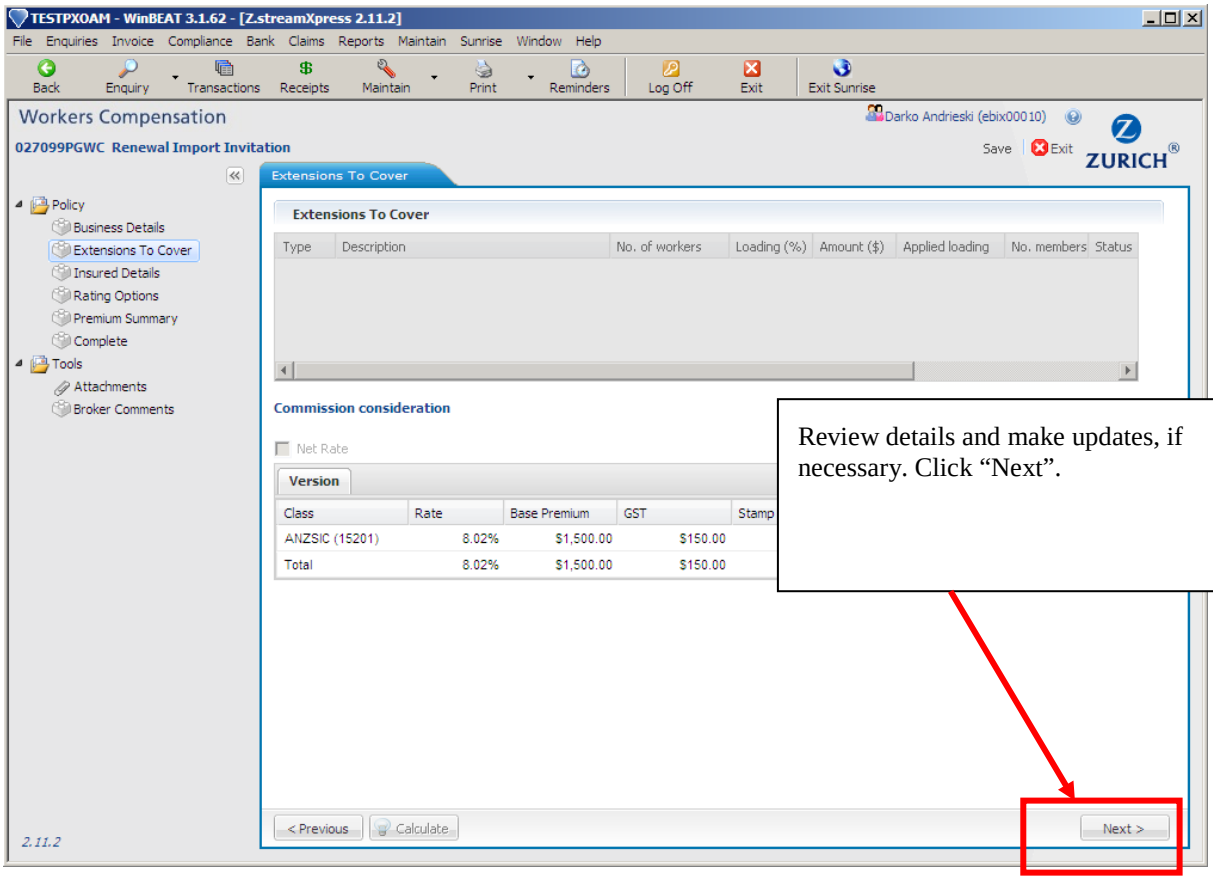
Review the Client details vs Insured details by clicking between the tabs in this screen. Then, answer Yes or No based on whether you wish to apply the details from the Client screen to the Insured details screen for this policy.

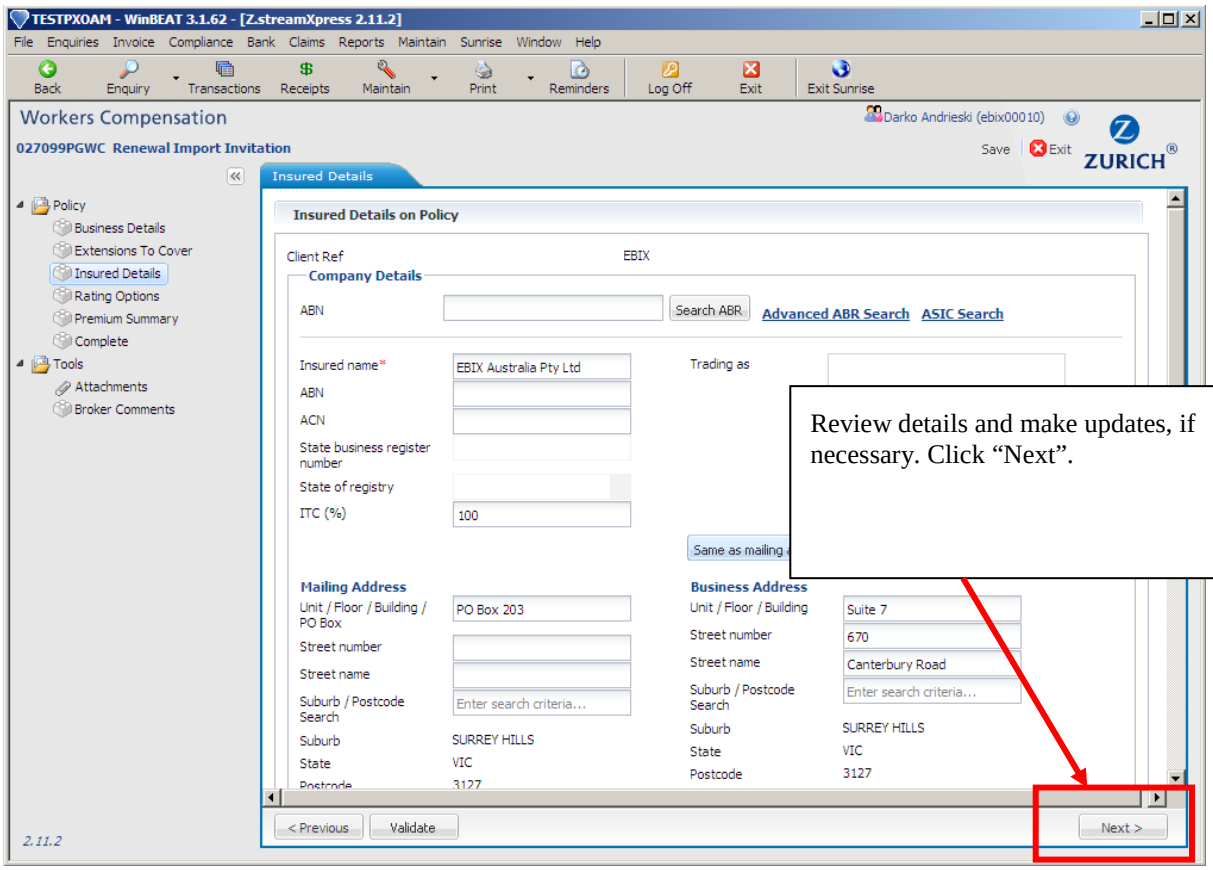
Note: the client details come from the master client in the broking system.

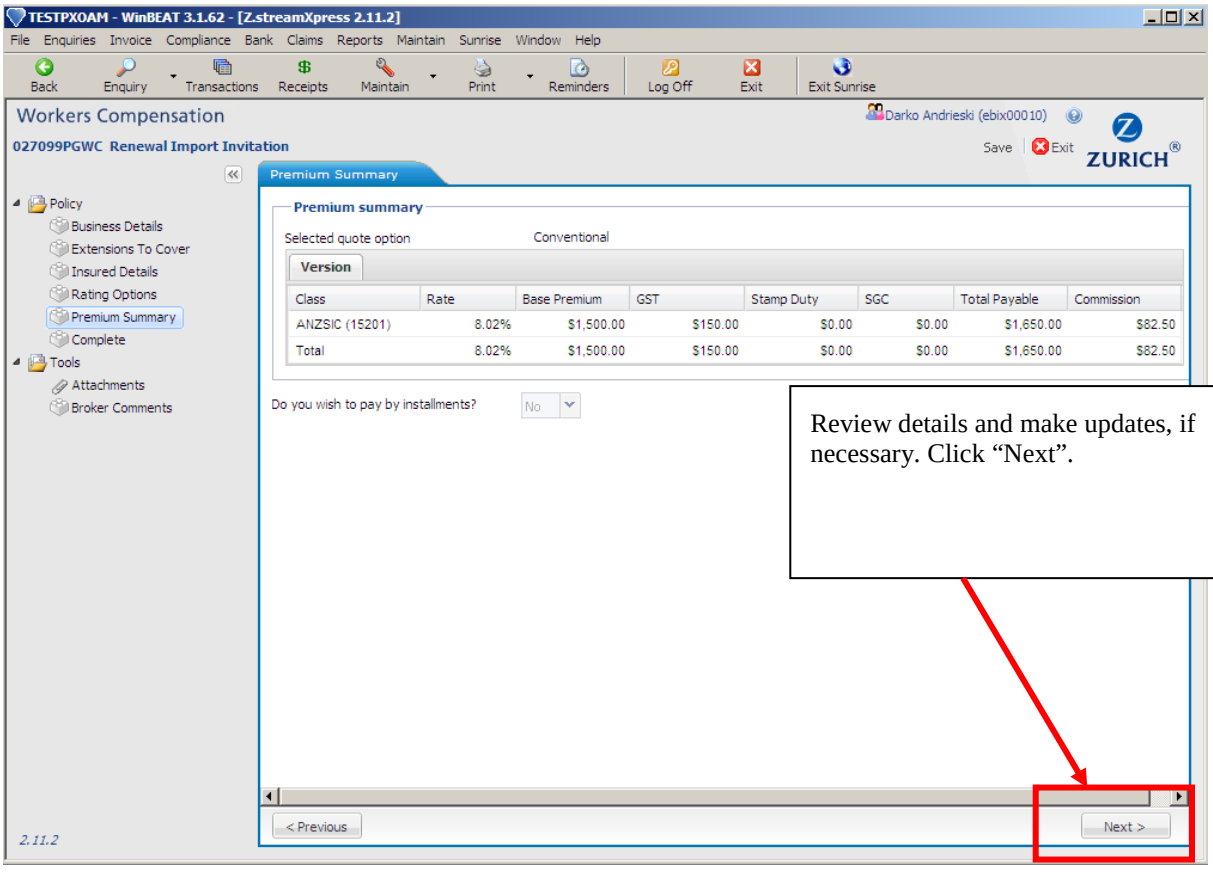


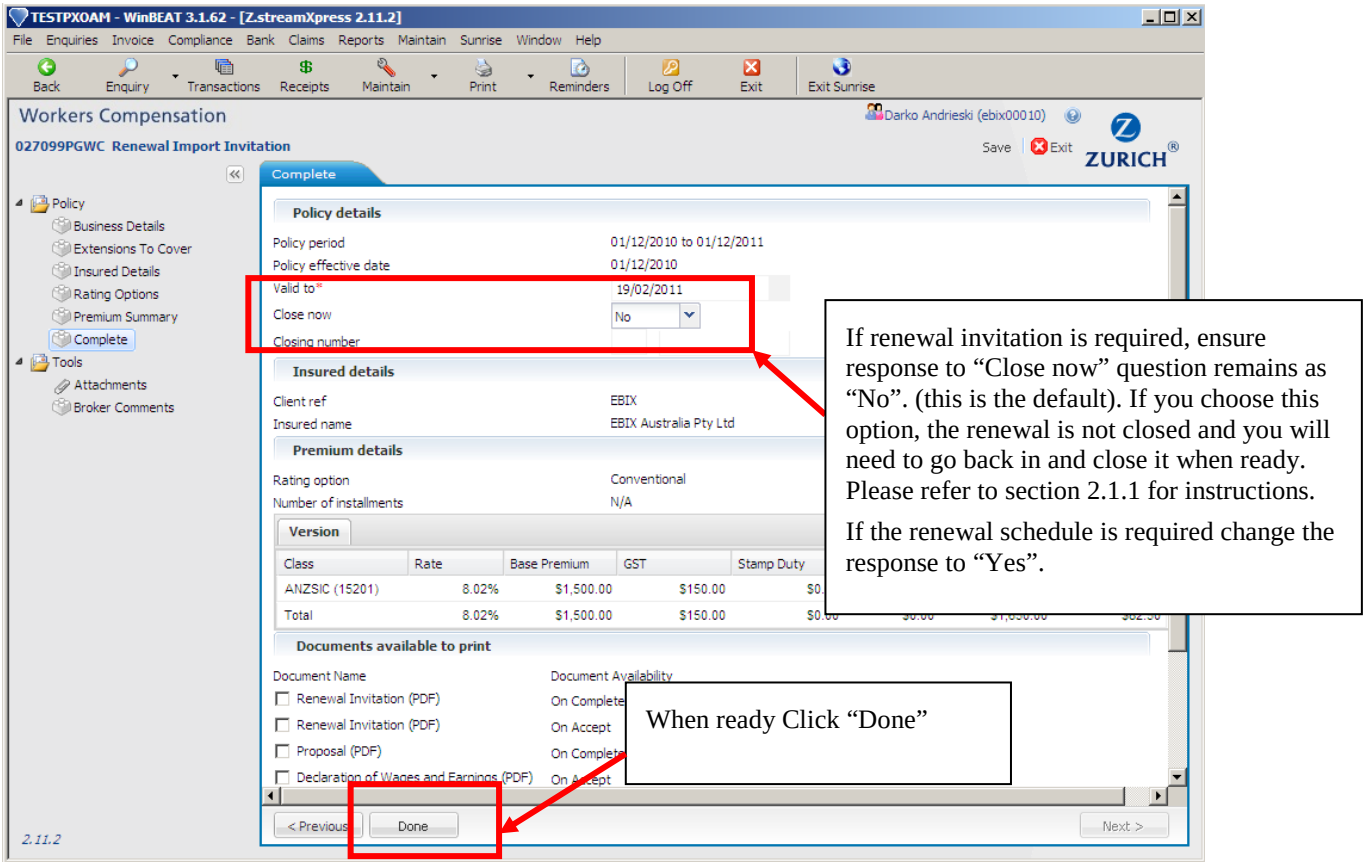
If you say yes to updating the insurers system, you will get an additional confirmation screen, if you say no, it will be launched into the insurers screen, for Zurich this is Xpress.


TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]
Workers Compensation
027099PGWC Renewal Import Invitation
Business Details
Policy
Business Details
Extensions To Cover
Insured Details
Rating Options
Premium Summary
Complete
Tools
Attachments
Broker Comments
Insured name
EBIX Australia Pty Ltd
Account*
2016444
Stamp duty exempt?
No
Business details
Year of establishment*
2010
State
TAS
Client description of business*
027096PGWC
Occupation details
Claims experience
Have you made any claims in the last 5 years?*
No
Claims details valid as of
01/12/2010
< Previous
Calculate
Add Comment
Add Referral
Next >
Review details and make updates, if necessary. Click “Next”.

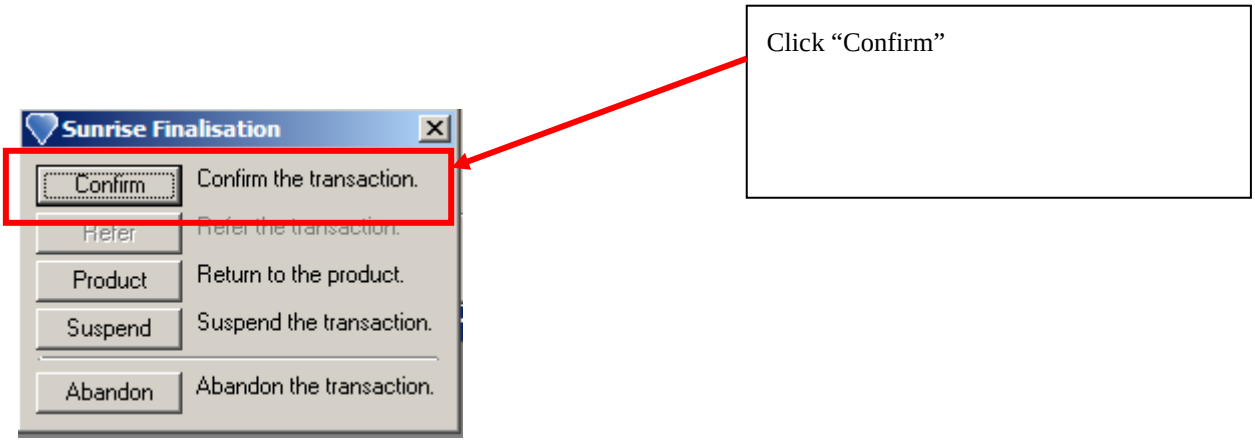

TESTPXOAM - WinBEAT 3.1.62 - [Z.streamXpress 2.11.2]
Workers Compensation
027099PGWC Renewal Import Invitation
Extensions To Cover
Extensions To Cover
Commission consideration
Net Rate
Version
Class
Rate
Base Premium
GST
ANZSIC (15201)
8.02%
$1,500.00
$150.00
Total
8.02%
$1,500.00
$150.00
< Previous
Calculate
Next >
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
Policy
Business Details
Extensions To Cover
Insured Details
Rating Options
Premium Summary
Complete
Tools
Attachments
Broker Comments
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
Policy
Business Details
Extensions To Cover
Insured Details
Rating Options
Premium Summary
Complete
Tools
Attachments
Broker Comments
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”.



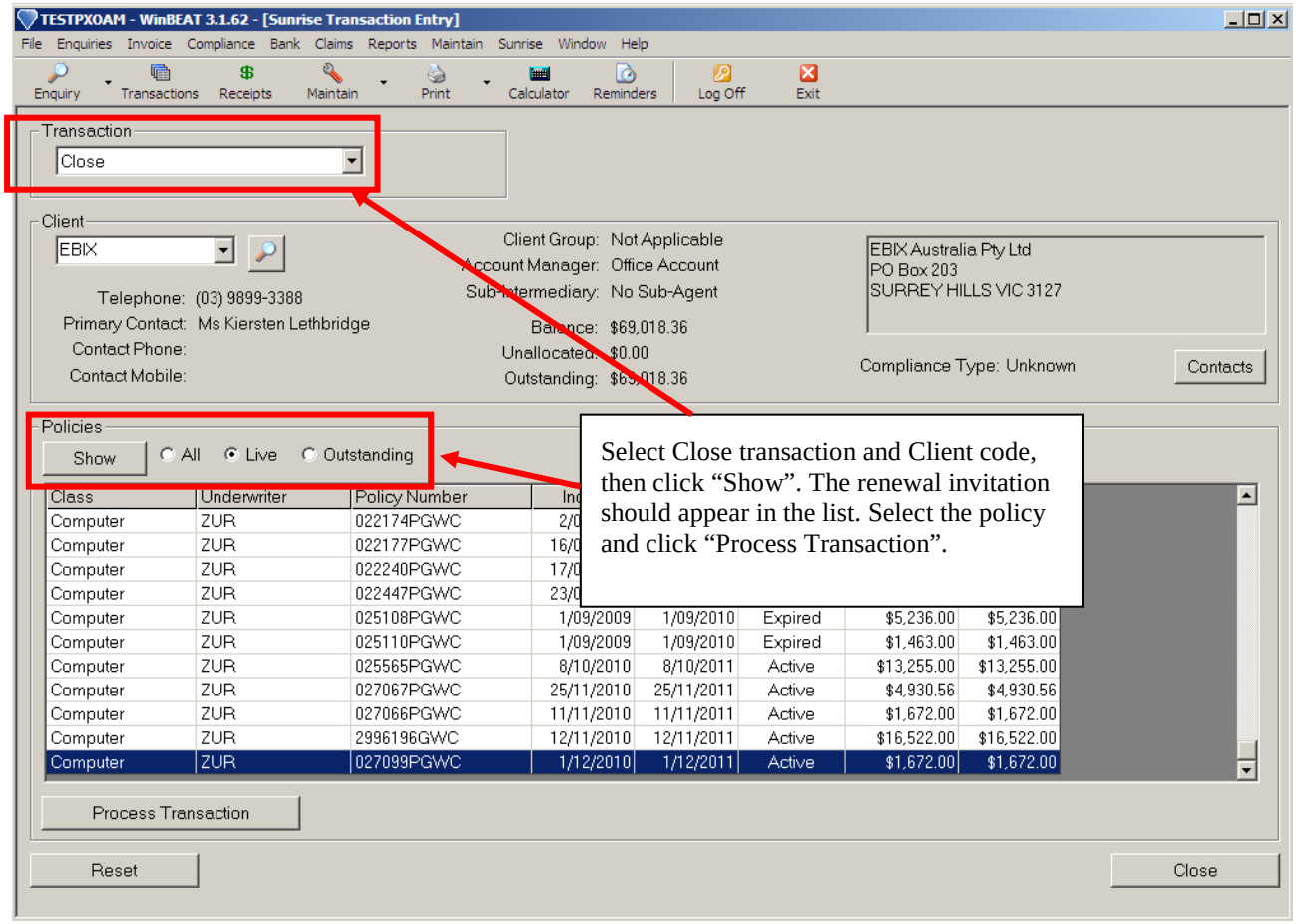
This will take the user back to their BMS (in our example the Winbeat system)



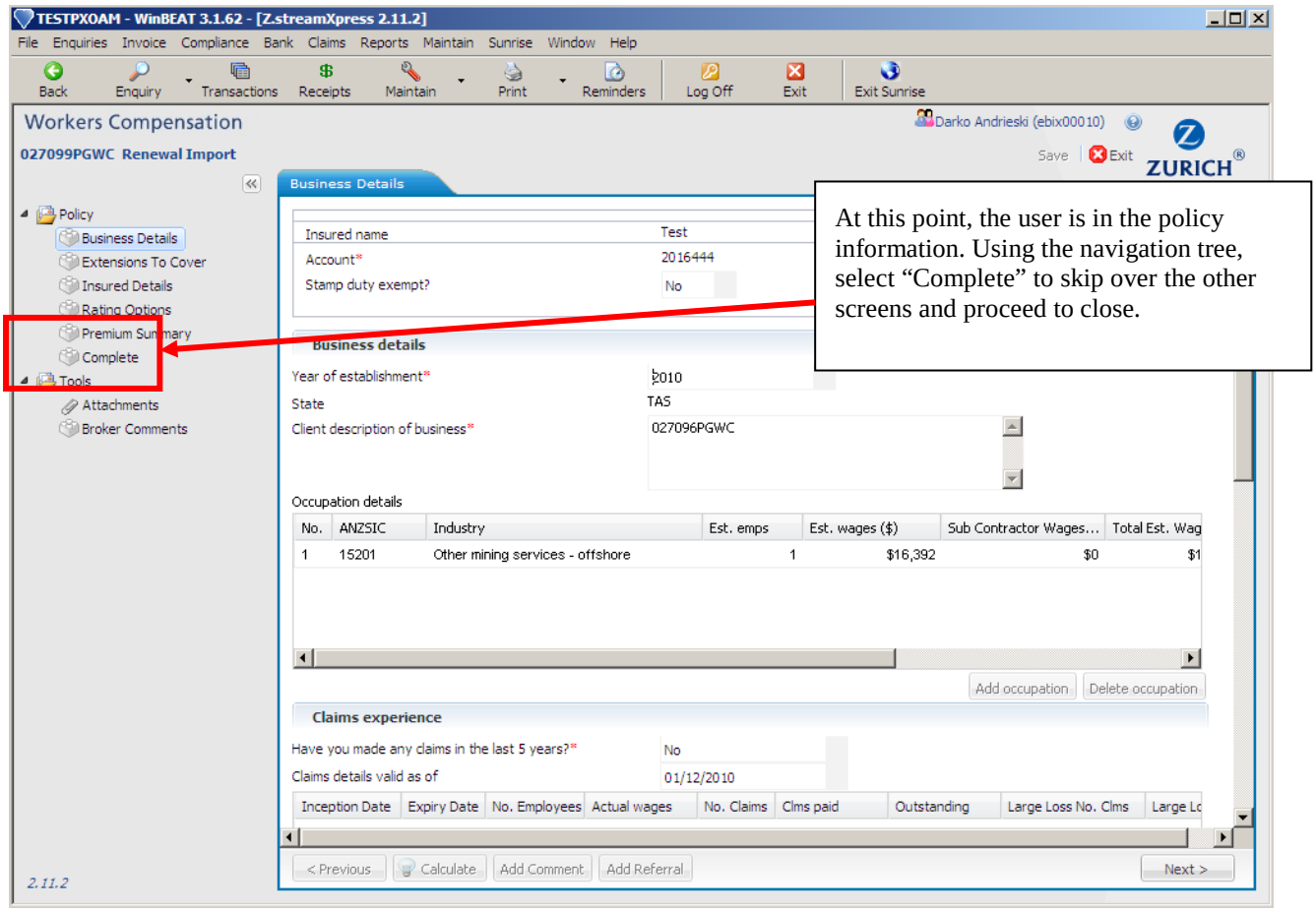
The renewal import has now been processed successfully.

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

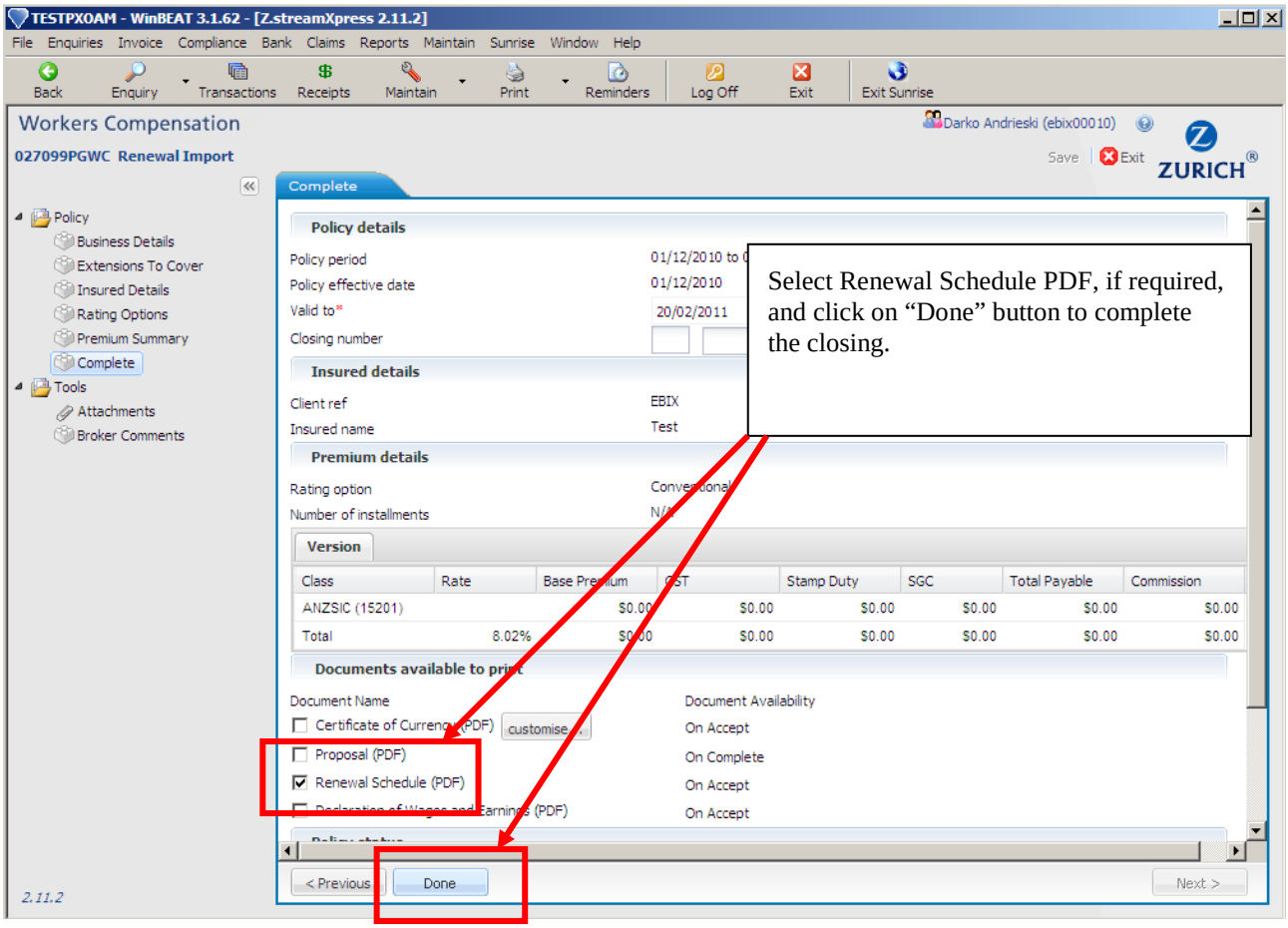
To close a policy in renewal unclosed status (i.e. a renewal invitation):

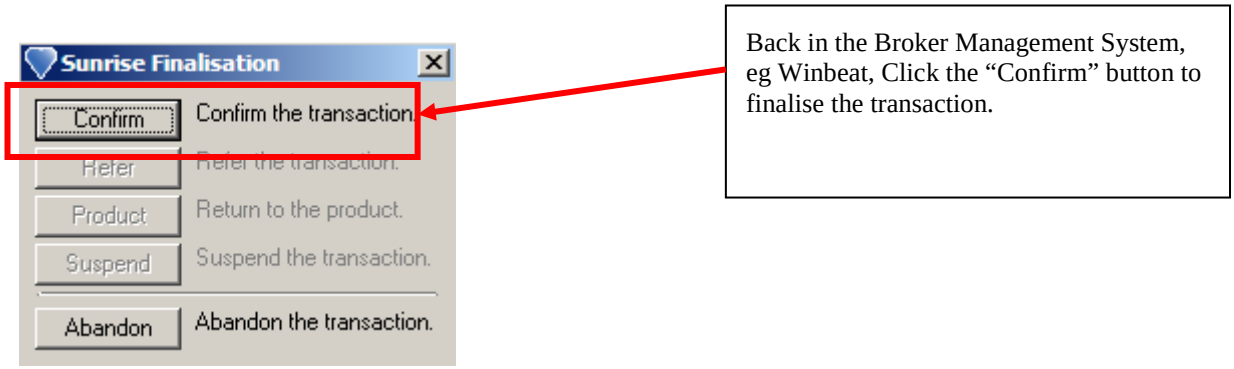


ZstreamXpress is then launched.



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.

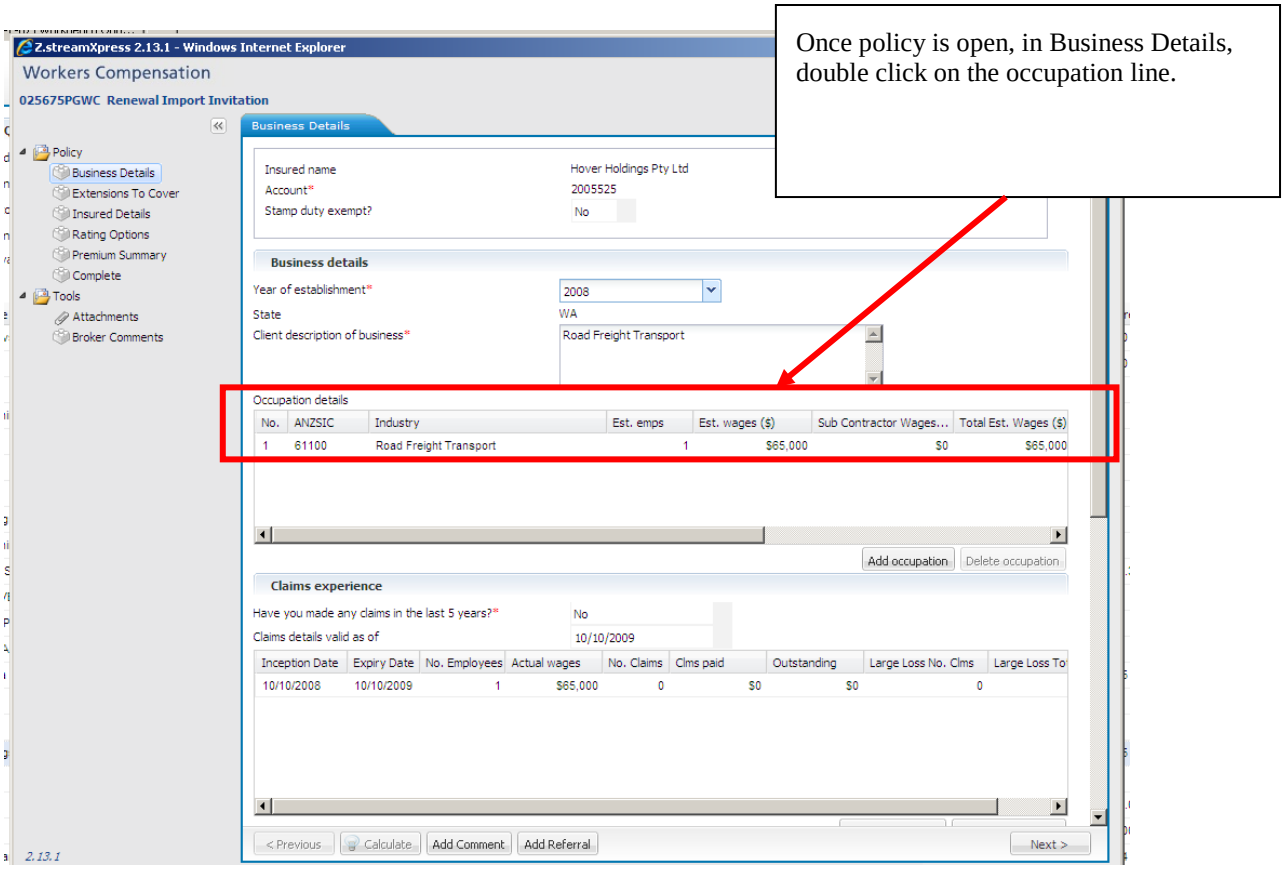


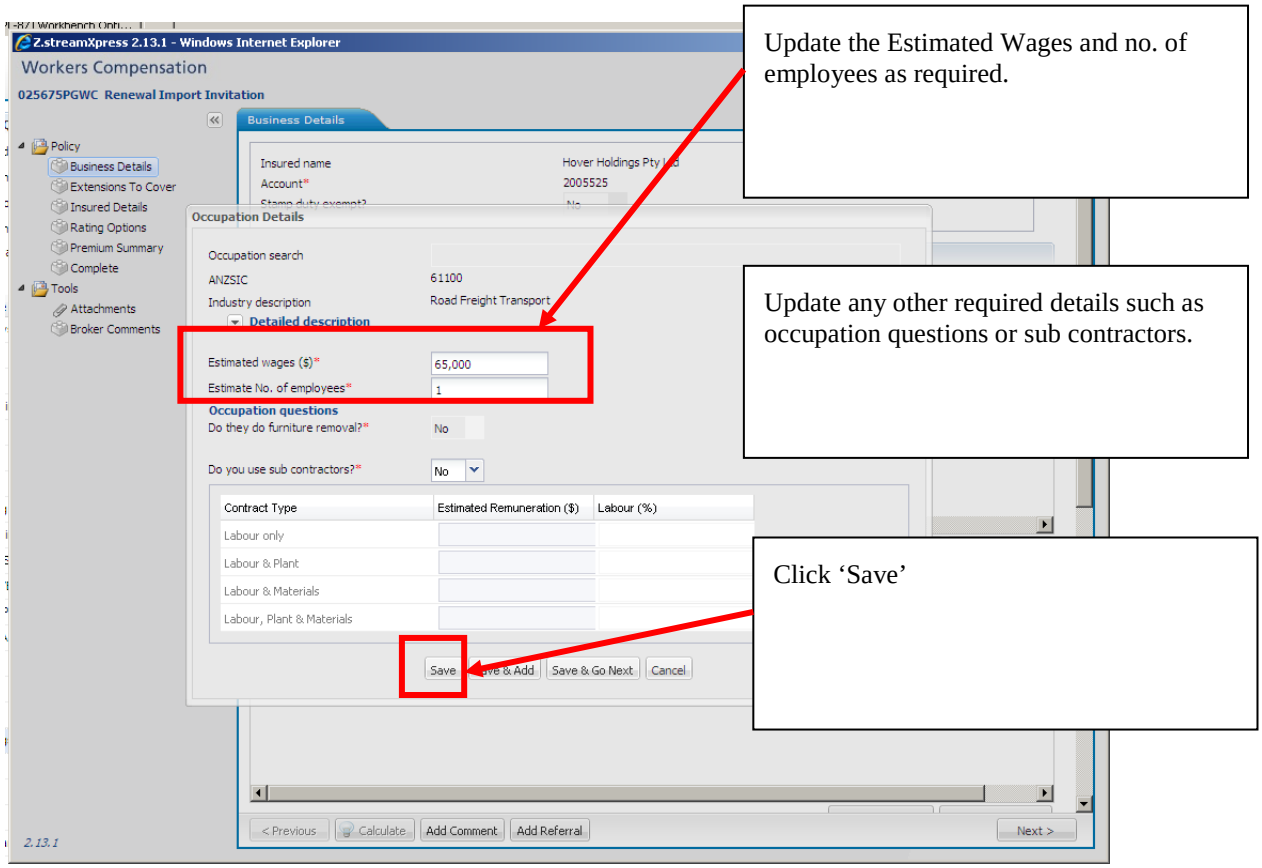


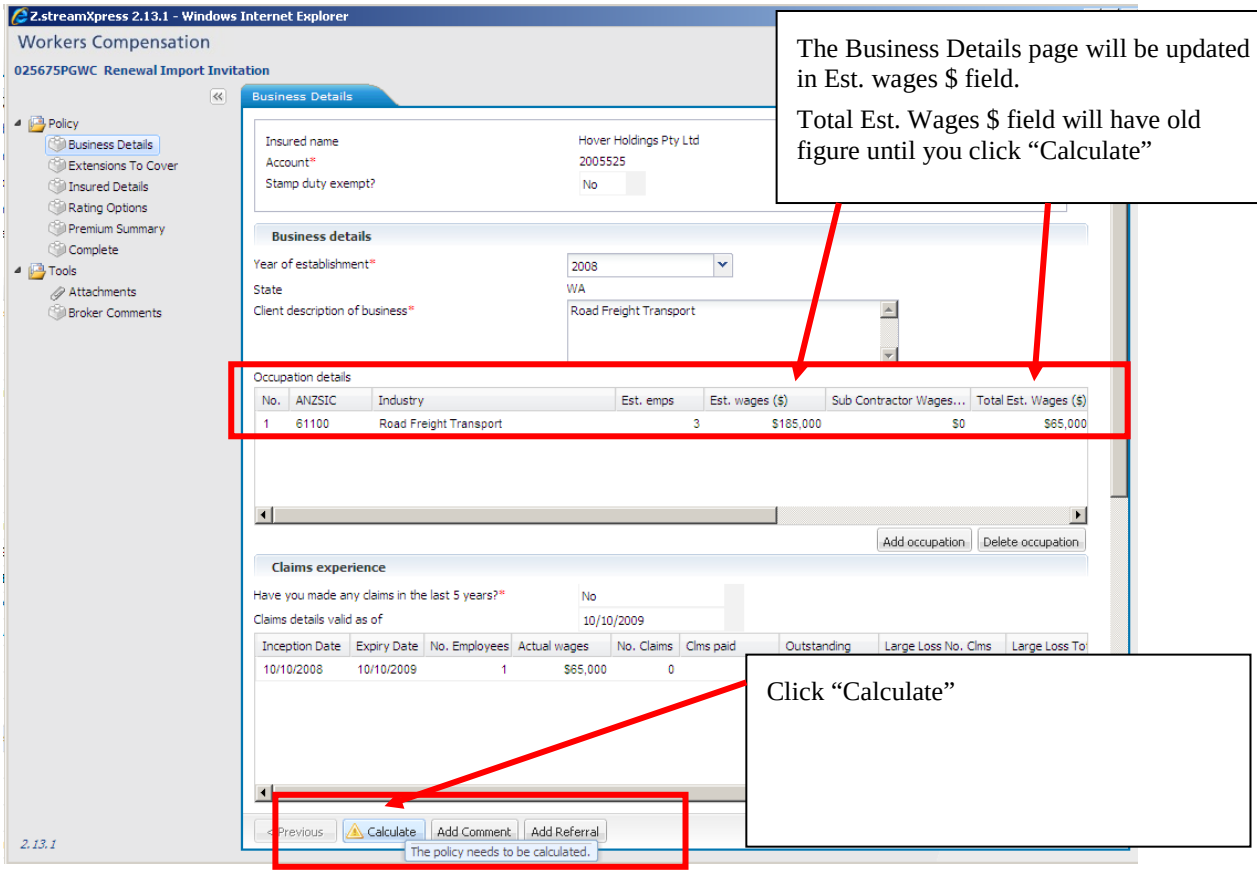
The renewal import has now been successfully closed and the policy is renewed.

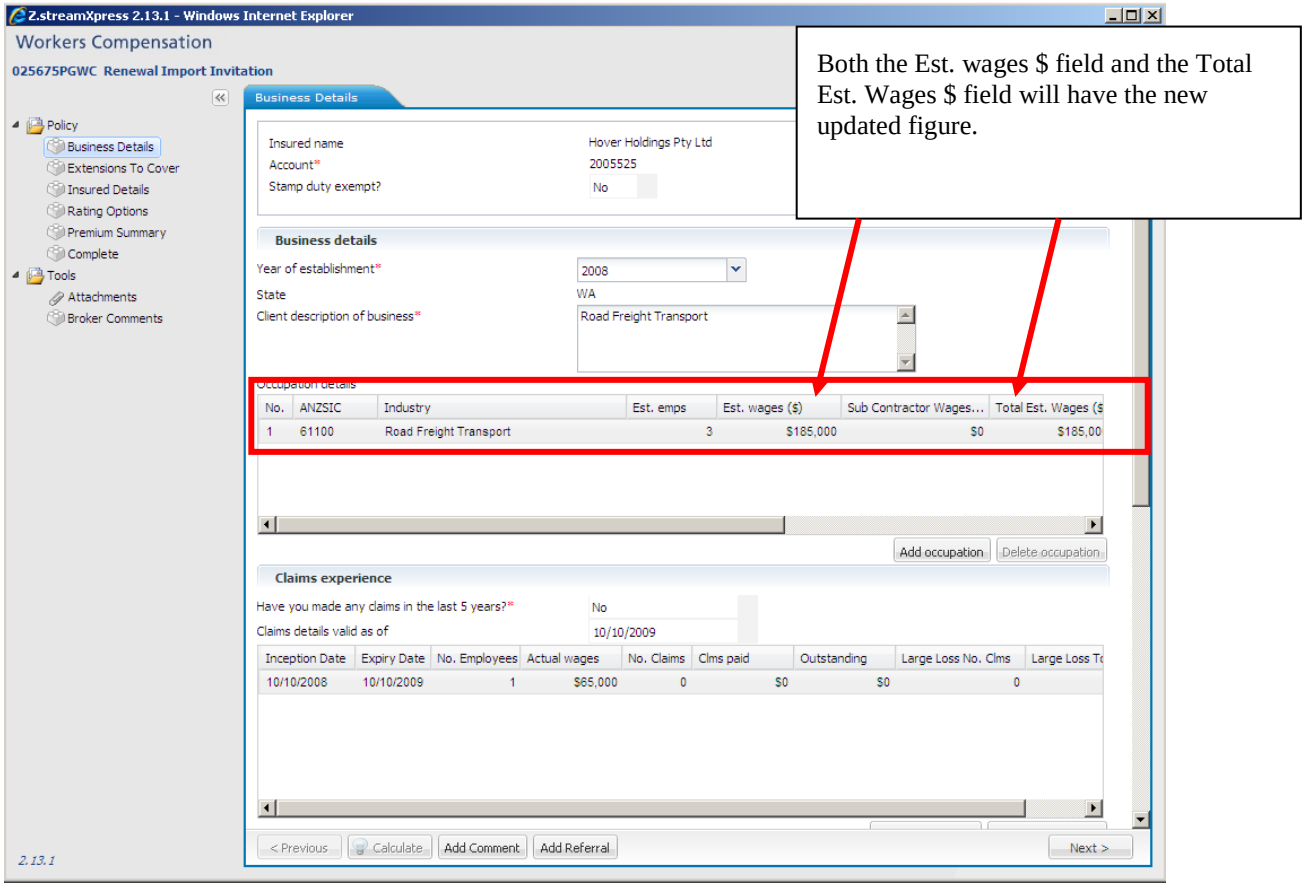
2.1.2 How to complete wage adjustments for a renewal

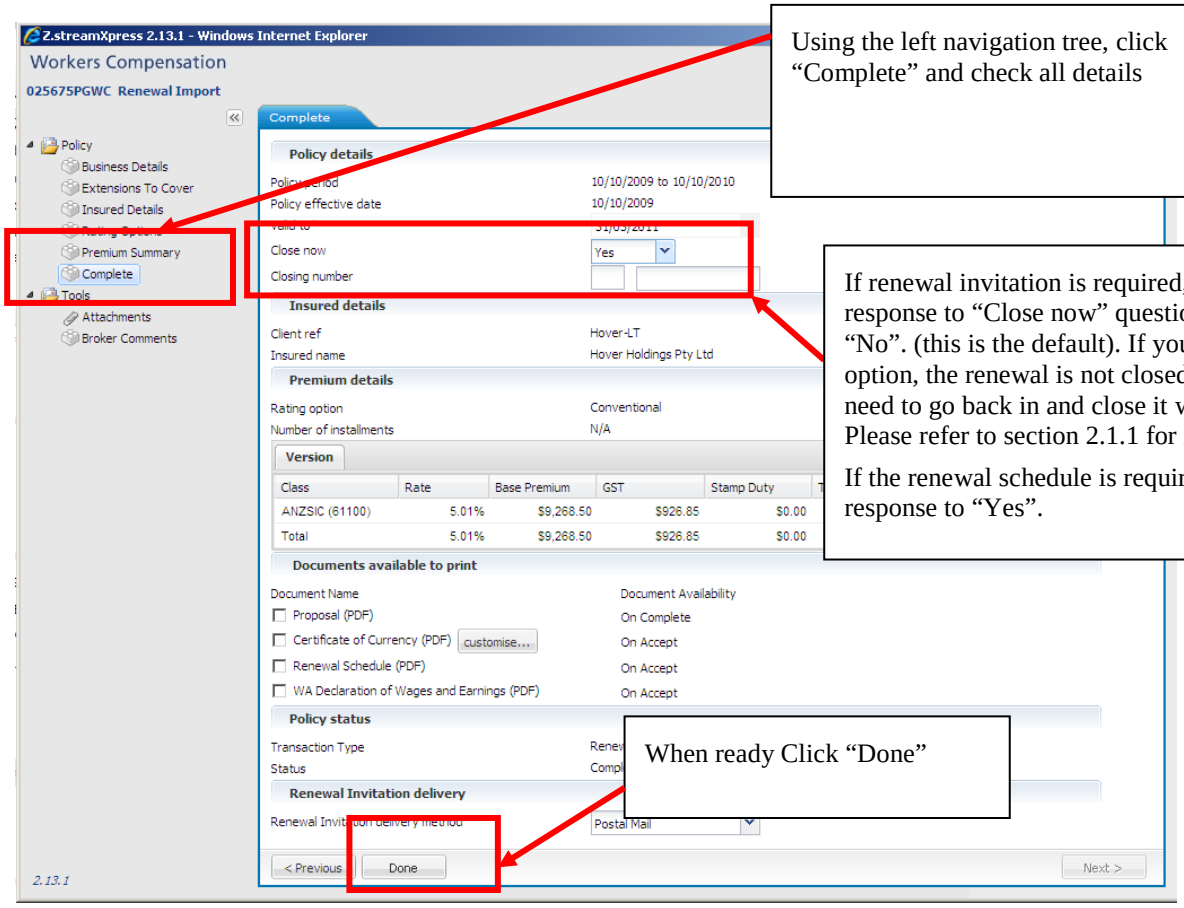
The following steps are if the estimated wages that were imported into the renewal need to be adjusted:






Z.streamXpress 2.13.1 - Windows Internet Explorer
Workers Compensation
025675PGWC Renewal Import Invitation
Business Details
Policy
Business Details
Extensions To Cover
Insured Details
Rating Options
Premium Summary
Complete
Tools
Attachments
Broker Comments
Insured name
Hover Holdings Pty Ltd
Account*
2005525
Stamp duty exempt?
No
Business details
Year of establishment*
2008
State
WA
Client description of business*
Road Freight Transport
Occupation details
No.
ANZSIC
Industry
Est. emps
Est. wages ($)
Sub Contractor Wages...
Total Est. Wages ($)
1
61100
Road Freight Transport
3
$185,000
$0
$65,000
Add occupation
Delete occupation
Claims experience
Have you made any claims in the last 5 years?*
No
Claims details valid as of
10/10/2009
Inception Date
Expiry Date
No. Employees
Actual wages
No. Claims
Clms paid
Outstanding
Large Loss No. Clms
10/10/2008
10/10/2009
1
$65,000
0
< Previous
Calculate
Add Comment
Add Referral
The policy needs to be calculated.
2.13.1
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”


Z.streamXpress 2.13.1 - Windows Internet Explorer
Workers Compensation
025675PGWC Renewal Import Invitation
Business Details
Policy
Business Details
Extensions To Cover
Insured Details
Rating Options
Premium Summary
Complete
Tools
Attachments
Broker Comments
Insured name
Hover Holdings Pty Ltd
Account*
2005525
Stamp duty exempt?
No
Business details
Year of establishment*
2008
State
WA
Client description of business*
Road Freight Transport
No.
ANZSIC
Industry
Est. emps
Est. wages ($)
Sub Contractor Wages...
Total Est. Wages ($
1
61100
Road Freight Transport
3
$185,000
$0
$185,00
Add occupation
Delete occupation
Claims experience
Have you made any claims in the last 5 years?*
No
Claims details valid as of
10/10/2009
Inception Date
Expiry Date
No. Employees
Actual wages
No. Claims
Clms paid
Outstanding
Large Loss No. Clms
10/10/2008
10/10/2009
1
$65,000
0
$0
$0
0
< Previous
Calculate
Add Comment
Add Referral
Next >
2.13.1
Both the Est. wages $ field and the Total Est. Wages $ field will have the new updated figure.



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"

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