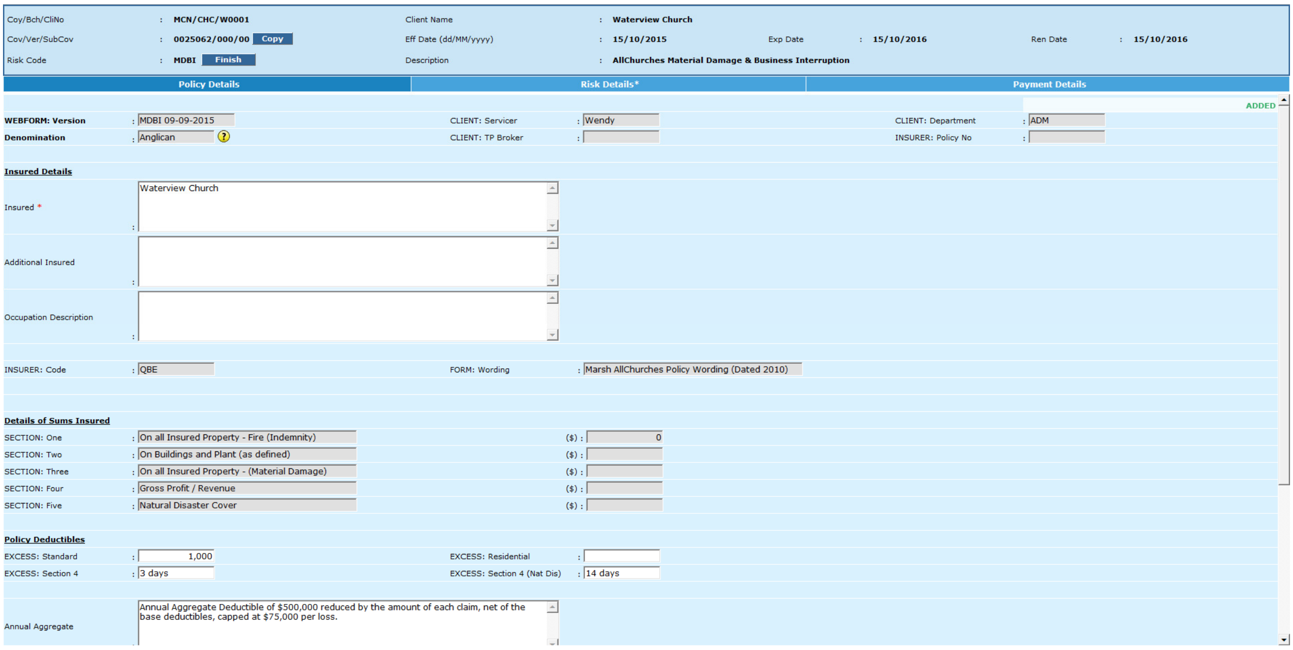
Presentation to AIB – 14th October 2015
By Wendy Craies

I am currently putting together the eGlobal System setup for the **Concordia Underwriting Agency LP** and wanted to highlight some of the basic functionality that will be available in this system.

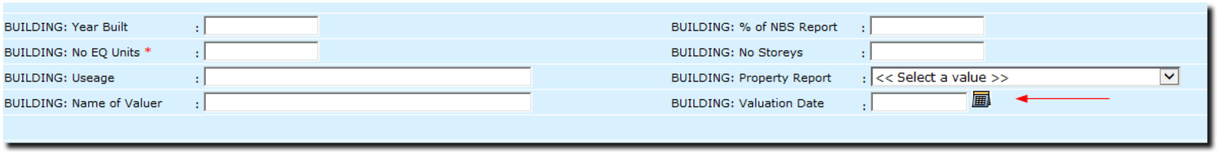
The eGlobal System is an Insurance Broking/Underwriting Agency System which is owned and developed by a company called **Ebix**, which is based in the USA and operates here in New Zealand, Australia, and Singapore and throughout Europe. It is predominately marketed at Fire & General business operators. It is currently being used by the majority of the Insurance Broking market here in New Zealand and has direct connectivity (i.e. real time transactions and connectivity) with several of the major Insurers here in New Zealand (Vero, NZI and also QBE).

One of the driving forces behind the system is their Module called **'WebForms'** which is a product builder and gives us the ability to build Risk specific Screens. These Screens will capture whatever information we decide needs to be collected on behalf of members and/or Underwriters.



Each field within the WebForm is totally unique and is then used in the production of output documentation and the various reports that will be required by all parties involved.

An example of what we could report on would be the Valuation Date:



We could create a report that was based on this field and pick dates in the database that were say pre 01/11/2014. The information would then be used to chase those involved up for updated valuations for the 2015/2016 Insurance Year.

At any stage, we have the ability to add further fields to the screen should they be required. With most off the shelf products you don't have this option, so it gives us a lot more flexibility.

Whilst the members within the various Denominations won't actually see these screens, it's good for you to know what has been developed specifically for your business and get a little bit of an understanding of what's happening in the background.

All of the information you provide to us on your Excel Spreadsheets, will be mapped into our database tables. When we come to do a transaction, we can suck this information up into the WebForm screen; this saves us time and will be the exact information you supply us with. From here, the various rates will automatically be fed through to the screen and based on your sums insured and what sections you have covered i.e. Building, Contents and/or Business Interruption will depend on what is calculated when we update the screen.

All this information is then pushed out into the Word Templates and we will produce PDF documents that you will then view through the CRM/Webpage which Craig Furness discussed at the meeting.

System Setup

Because we are dealing with a number of Denominations, we have to tailor the system to suit each block of business. For the Anglican portfolio, we have created specific Department Codes, which will be attached to the Client Record and then gets passed through to the Transactional records.

The Department Codes are used in a large number of reports within the system.

We have set up the following Department Codes for AIB:

TBL_CODE	TBL_ABBRNAME	TBL_FULLNAME
1	ANG - MANAWA O TE WH	Anglican - Hui Amorangi ki te Manawa o te Wheke
2	ANG - AIB	Anglican - Anglican Insurance Board
3	ANG - MISSIONS BOARD	Anglican - Missions Board
4	ANG - CPT	Anglican - The Church Property Trustees
5	ANG - CSN	Anglican - The Community of the Sacred Name
6	ANG - DUNEDIN	Anglican - Anglican Diocese of Dunedin
7	ANG - PENSION BOARD	Anglican - NZ Anglican Church Pension Board
8	ANG - RAINCLIFF	Anglican - Raincliff Trust Board
9	ANG - TAIRAWHITI	Anglican - Hui Amorangi ki te Tairawhiti
10	ANG - TE AUTE & HUKA	Anglican - Te Aute Trust Board
11	ANG - WAIAPU	Anglican - Anglican Diocese of Waiapu
12	ANG - WAIAPU ANGLICA	Anglican - Waiapu Anglican Social Services
13	ANG - ANGLICAN CARE	Anglican - Anglican Care (Waiapu) Group
14	ANG - WAIKATO & TARA	Anglican - Diocese of Waikato and Taranaki
15	ANG - WAIPOUNAMU	Anglican - Anglican Maori Diocese o Te Waipounamu
16	ANG - ANGLICAN LIVIN	Anglican - Anglican Living
17	ANG - ANGLICAN CARE	Anglican - Anglican Care, Canterbury-Westland
22	ANG - GENERAL SYNOD	Anglican - General Synod / te Hinota Whanui
23	ANG - CHCH CITY MISS	Anglican - Christchurch City Mission

24	ANG - DUNEDIN PARATA	Anglican - Parata Anglican Charitable Trust
25	ANG - MANAWA O TE WH	Anglican - Te Tai Hauauru, Manawa o te Wheke
26	ANG - COLLEGE HSE IN	Anglican - College House Institute of Theology
27	ANG - ANGLICAN CHURC	Anglican - The Anglican Church of Aotearoa,
31	ANG - PIHOPATANGA O	Anglican - The Anglican Church of Aotearoa
33	ANG - AUCKLAND	Trust Investments Ltd
34	ANG - DUNEDIN FAMILY	Anglican - Anglican Family Care, Dunedin
35	ANG - AVONSIDE TRUST	Anglican - Avonside Trust House
37	ANG - WELLINGTON	Anglican - Anglican Diocese of Wellington
38	ANG - ST MARY'S SCHO	Anglican - St Mary's Diocesan School
40	ANG - HEREWORTH SCH	Anglican - Hereworth School
41	ANG - ANGLICAN SCHOO	Anglican - Anglican Schools Office
42	ANG - NGA TAWA SCHOO	Anglican - Nga Tawa Diocesan School
43	ANG - WELLESLEY COLL	Anglican - Wellesley College
44	ANG - TE PAATU	Anglican - Te Paatu Marae Trustees
46	ANG - SAMUEL MARSDEN	Anglican - Samuel Marsden Collegiate School
47	ANG - ST MARKS SCHOO	Anglican - St Mark's Church School
48	ANG - WANGANUI COLLE	Anglican - Wanganui Collegiate School
49	ANG - TRINITY SCHOOL	Anglican - Trinity Schools Trust Board
50	ANG - UPOKO - RANGIA	Anglican - Rangiatea Maori Pastorate
51	ANG - UPOKO O TE IKA	Anglican - Hui Amorangi ki te Upoko o te Ika
52	ANG - CHILTON SAINT	Anglican - Chilton Saint James
53	ANG - NZCMS	Anglican - NZ Church Missionary Society
54	ANG - UPOKO RANGITIK	Anglican - Rangitikei Manawatu Maori Pastorate
55	ANG - UPOKO AOTEA KU	Anglican - Aotea-Kurahaupo Maori Pastorate
56	ANG - UPOKO ROTA WAI	Anglican - Rota Waitoa
57	ANG - UPOKO WAIRAPAP	Anglican - Wairarapa Maori Pastorate
58	ANG - TE WHARE ROIMA	Anglican - Te Whare Roimata Trust

59	ANG - TE MIHANA MAOR	Anglican - The Church of the Holy Sepulchre

These will be used for reporting purposes.

Reports that can be run using the Department Codes:

- **Pre Renewal List**
  Lists Policies due for renewal in a specific date range
- **Client Detailed Aged Debtors Listing**
  Lists each accounting transaction that makes up the balance on Account
- **Client Aged Debtors Listing**
  Summary of the above report
- **Brokerage/Premium Comparison Report**
  This report will give a comparison of the selected periods premium and brokerage figures with the corresponding period last year together with a year to date comparison
- **Revenue Report (by Insurer)**
- **Invoice Register**
  This is an audit trail of all invoices created by eGlobal for a given date range.
- **Earned Income Report**
- **Multiple Standard Letters**

On top of this, we can create WebReports as required based on the Department Code. This will mainly relate to Accounting information. Anything that requires reporting on within the WebForms, we will create Crystal Reports for.

Excel Spreadsheets

Once everything is ready to be sent through to QBE and the other participating Underwriters i.e. Spreadsheets are all up to date, these will be forwarded through to me so that we can start putting this information into the Database Tables ready to start doing the transactions.

Purpose of the WebForms

- If used for documentation purposes and has no connection to the accounting side of the system.
- Captures Underwriting Information as required by each member.
- The WebForm Data is then used when we create Crystal Reports for the Underwriters, MGA and specially required by members e.g. Methodist with Synods
- Automatically calculates premium. There will be 3 sets of calculations happening at the same time within the Risk Details Screen. The MGA, Underwriters and then the Churches premium that they will be charging individual members.
- Sets up the Instalment plans automatically. The accounting system outside also has the ability to do this and will release instalments as they fall due.
- Prepare quotes for existing or new clients
- Issue Certificates of Insurance (we have 8 templates available on each WebForm)

Claims System

eGlobal has a fully functional claims system that interfaces with the Broking System. All of your small claims which fall underneath the policy excess can also be recorded as this is all vital information required for Risk Management.

There are a number of claim specific reports within the system that can be run on a regular basis to keep on top of what is outstanding, or isolate any troublesome claims.

By loading all this information into the system, we will then be able to calculate the Premium vs Claims for Underwriters or individual members. This is imperative when it comes time to renegotiating renewal terms at the end of each year.

Additional Functionality

Along with everything noted above, here’s a list of some additional information or options we have available:

- Prospects – helps us keep a track on who we have quoted and their contact information for further follow up
- Client Maintenance – which is the starting point for any account
- Associates – people connected to the various organisation/parishes
- Policy Transactions which will include Quotes
- Register of Insurance which is a list of what has been covered based either on the Client Number and/or the Group Code (which will be the Department Codes shown above)
- Standard Letters – run on an individual client or a mass mail out
- Diary notes
- Activity Log – notes everything that has been done in the system, by whom and dates that each activity was done
- Full Accounting functionality for paying Underwriters, Sub Agents, Clients and Third Party Brokers