



Z.streamXpress – Workers’ Compensation

Z.streamXpress has the ability to deliver Zurich’s Workers’ Compensation product with speed and efficiency. This quick reference guide has been developed to give you a brief snapshot of the functionality available within the system. For more information, please refer to your detailed User Guide or speak with your regional Electronic Solutions Manager.

Z.streamXpress Fast, seamless & convenient

Navigation Menu

QN000017456-

Quote / Policy number

Business Details

The Business Details screen is where you will enter the majority of the underwriting and risk cover details

Extensions To Cover

Extensions of Cover can be added here (if allowed under state legislation)

Insured Details

Insured Details – here you search for an ABN, enter Insured details and add situations

Rating Options

Rating Options include Claims Experience Discount, Extended CED & Burner. Options are available for selection based on premium content

Premium Summary

Premium Summary – an overall snapshot of total premium payable. You may also choose to pay by instalments here

Complete

Here you may view policy dates/period, select schedules to print & change the Renewal Invitation delivery method

Attachments

Attachments may be added onto the quote / policy here

Broker Comments

Broker comments may be included here. These do not print on policy documents

Alerts

An 'X' flag  in the navigation menu alerts you to the mandatory information that is missing. A description of the missing information is displayed at the top of the respective screen

Business Details

 **Client description of business** is required.

A red asterisk  indicates the mandatory fields required to complete the transaction

 **Business Details**

A green flag  shows that the referral has been approved and no further action is required

 **Business Details**

A red flag  on the navigation menu indicates that a referral has been generated and requires actioning by Zurich

 **Business Details**

A red flag with a cross  indicates that a referral has been declined

Save & Exit

Save

The Save option allows you to intermittently save your work without exiting

 **Exit**

This exits the transaction – any unsaved data will be lost

Easy steps to complete a Quote

Z.streamXpress has been designed to allow you to obtain a quote with a minimal number of keystrokes. You may then process the policy to completion with no double keying.

Under “Business Details” enter/select:

- **Account number**
- **Year of Establishment**
- **Client description of business**

Free form field to accurately describe the business activities. This appears on policy schedules

- **Occupation details**

1. Select “Add Occupation”
2. Enter the occupation name or ANZSIC code with a minimum of three alpha-numeric characters to execute the search
3. Select the occupation and complete the required fields in the table
4. Select “Save” to add data and return to the Business Details screen. Select “Save & Add” to add current data to the Business Details screen and to add more ANZSICs

- **Claims Experience – “Have you made any Claims in the last 5 years?”**

Answering “Yes” requires completion of detailed claims experience

Select “Calculate” at the bottom of the page. On the Complete page your available documents can be selected for printing. Press Done at the bottom of the page to complete your quote.

Referrals

Z.streamXpress has an in-built referral approval function - some referrals are automatically approved as you process business. Where an Underwriting Authority is outside of this automatic approval process a red referral flag will be shown on the left hand navigation panel and the transaction must be referred to Zurich. To review the referral details, click on the  **Referral** icon and you will be presented with specific details relating to the referral.

Referral Details
System | 10/03/2010 12:50
Owner: Business Details
Version: 1
Message: The Annualised Actual Premium of \$12056.0 is greater than \$10,000 and the Premium has changed by more than 5%. The System will automatically approve the Referral up to your Premium Limit of \$15000.0.

Message	Decision	Decision Date
The Annualised Actual Premium of \$12056.0 is greater than \$10,000 and the Premium has changed by more than 5%. The System will automatically approve the Referral up to your Premium Limit of \$15000.0.	APPROVED	10/03/2010 12:50

Occupation is ANZSIC 01190 which requires underwriter review.

Show History will list all historical referrals on the policy.

Remove Manual Referral Show History

Broker Comment Underwriter Decision Comment

A user can remove a Manual Referral by selecting the Remove Manual Referral button.

Remove Manual Referral

Cancel Save

In the above screenshot, the referral has been signed off automatically and the Decision comment “Approved” has been included on the Referral summary screen. Where a referral cannot be signed off by the system, the transaction must be referred to Zurich.

Broker Comments

Broker comments can be made via the navigation menu or where an “Add Comment” appears. These do not print on policy documents and are used for a dialogue between the broker and underwriter. Once the comment has been added, select “Save”. Comments cannot be deleted or edited. A history of comments can be seen.

Comment

Subject*

B I U S  **Background** **Foreground**

Cancel Save

Bottom Panel

Validate

Validates the ABN on the Insured Details screens

Add Referral

Allows the user to add a manual referral for review by Zurich

 **Calculate**

The yellow alert indicates that a calculation is required

Next >

Allows you to navigate to the next screen

< Previous

Allows you to navigate to the previous screen

Add Comment

Click to add a comment, these do not print on policy documents

Done

Select Done to save & exit, and continue the processing of the policy to the next stage

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Here to help your world.

ABN Search

An ABN Search functionality has been built in Z.streamXpress to assist you in completing information on the Insured Details screen. If you know the ABN number for the insured, enter the ABN number into the ABN field and press "Search ABR". This will automatically populate ABN and Legal Entity details on the Insured screen.

If you do not know your clients ABN and you wish to use ABN Search facility:

- Click on Advanced "ABR Search" or "ASIC Search" (which will take you to an official website) and search for your client
- When you find the client, highlight and copy the ABN number and close the search
- Paste the ABN number in the ABN field in Z.streamXpress and select "Search ABR"
- The ABN and Insured Names will be populated automatically

Insured Details

Insured Details on Policy

Client Ref

GOODBROKER

Company Details

ABN

Search ABR

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

Insured name*

Best Broking

Trading as

ABN

Attaching Documents

Documents can be attached to the policy transaction via the attachments section.

- Enter the name of the document
- Select the document type from the drop down list
- Enter a description of the document
- Select "Browse..." to attach from a directory on your PC
- Click  Attach to complete the process

Add attachments

Name*

Signed Proposal

Type*

Signed Proposal

Description*

Document Description

Attachment*

Browse...

 Attach

Tips

- The keyboard is quicker than the mouse. When processing, Tab forward to get to the next available field for completion/ selection. To go backwards use Shift + Tab together.
- Review the help functions. These fields offer valuable information such as product specific text and assistance to help you with processing. Select the ? icons to open up the help panels.
- Drop down selections. When in a drop down box, if you are familiar with the contents just enter the first character of the item you wish to select i.e. 'N' = 'No'
- Search fields. Use a minimum of three characters to search, for example for Newsagent, type "New". As you enter more characters the search results are refined/reduced.

Complete Screen

The "Complete" screen provides you with a summary view of the transaction. Here you can:

- Convert a Cover Note to New Business using the "Close now" option
- Review the premium details
- Select available documents for printing
- Change the renewal delivery method

Complete

Policy details

Policy period

10/03/2010 to 10/03/2011

Policy effective date

10/03/2010

Valid to*

09/04/2010

Cover Note expiry*

09/04/2010

Close now

Yes

Closing number

Insured details

Client ref

GOODBROKER

Insured name

Best Broking

Premium details

Rating option

Conventional

Number of instalments

N/A

Version

Class	Rate	Base Premium	GST	Stamp Duty	Total Payable	Commission
ANZSIC (52430)	2.16%	\$2,160.00	\$216.00	\$0.00	\$2,376.00	\$118
Total	2.16%	\$2,160.00	\$216.00	\$0.00	\$2,376.00	\$118

Documents available to print

Document Name

Document Availability

☐ Policy Schedule (PDF)

On Accept

☐ Certificate of Currency - First Period (PDF)

customise... On Accept

Policy status

Transaction Type

New Business

Status

Complete

Renewal Invitation delivery

Renewal Invitation delivery method

Postal Mail

< Previous

Done

Select Done to save & exit, and continue the processing of the policy to the next stage

The "Valid to" and "Cover Note expiry" dates default to 30 days however this can be reduced as per your requirements

The "Close now" option allows you to close the transaction. If you are at Cover Note stage, selecting "No" will keep the transaction type as a Cover Note. Selecting "Yes" will change the transaction type to New Business. The "Closing Number" field is non-mandatory.

Based on the transaction type and status, the system will present you with a list of documents available for printing

Select a Renewal Invitation delivery option from the drop down list to set the renewal delivery method:

- Postal Mail (default)
- Email

(Enter in the recipients email address - this must be a representative from your brokerage)

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Z.streamXpress

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