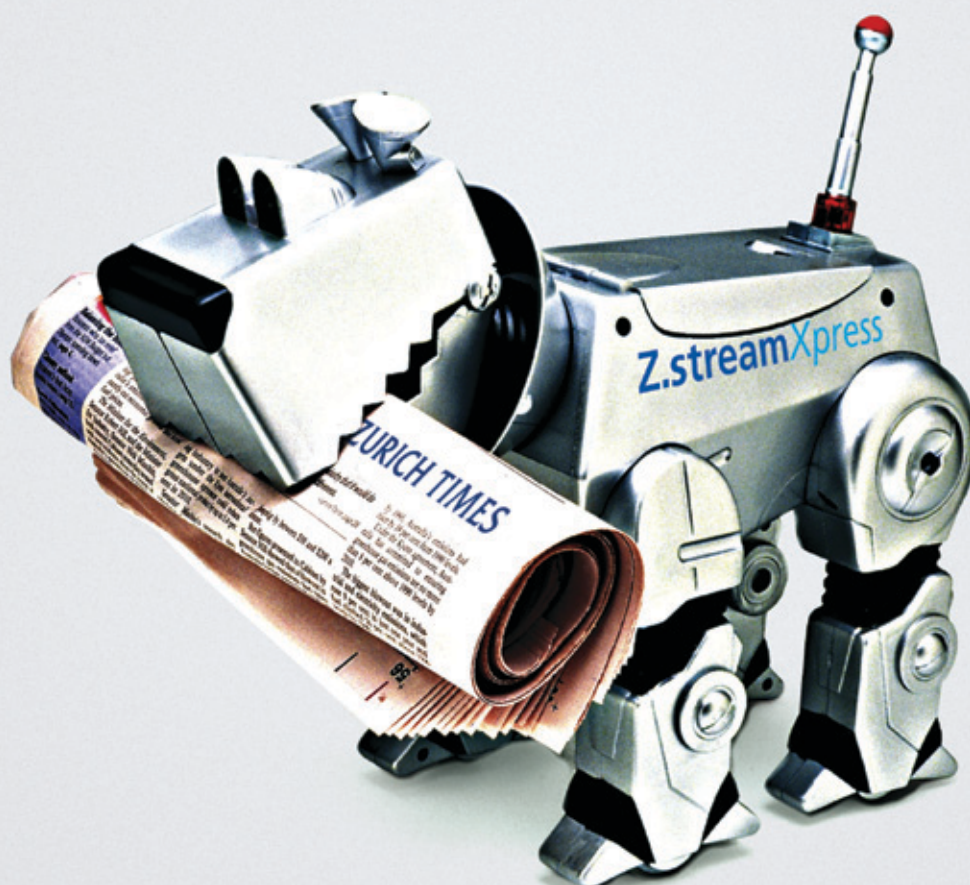


Z.streamXpress – Renewals Work Instructions

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

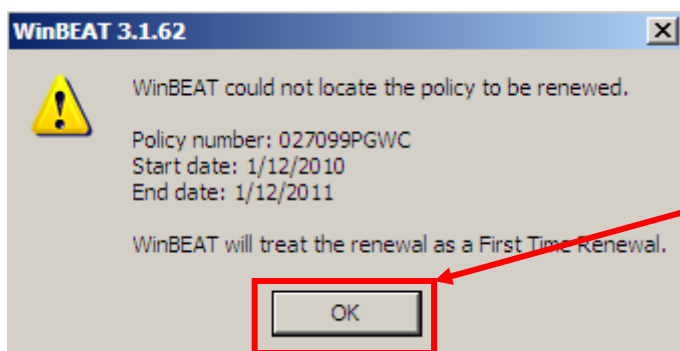
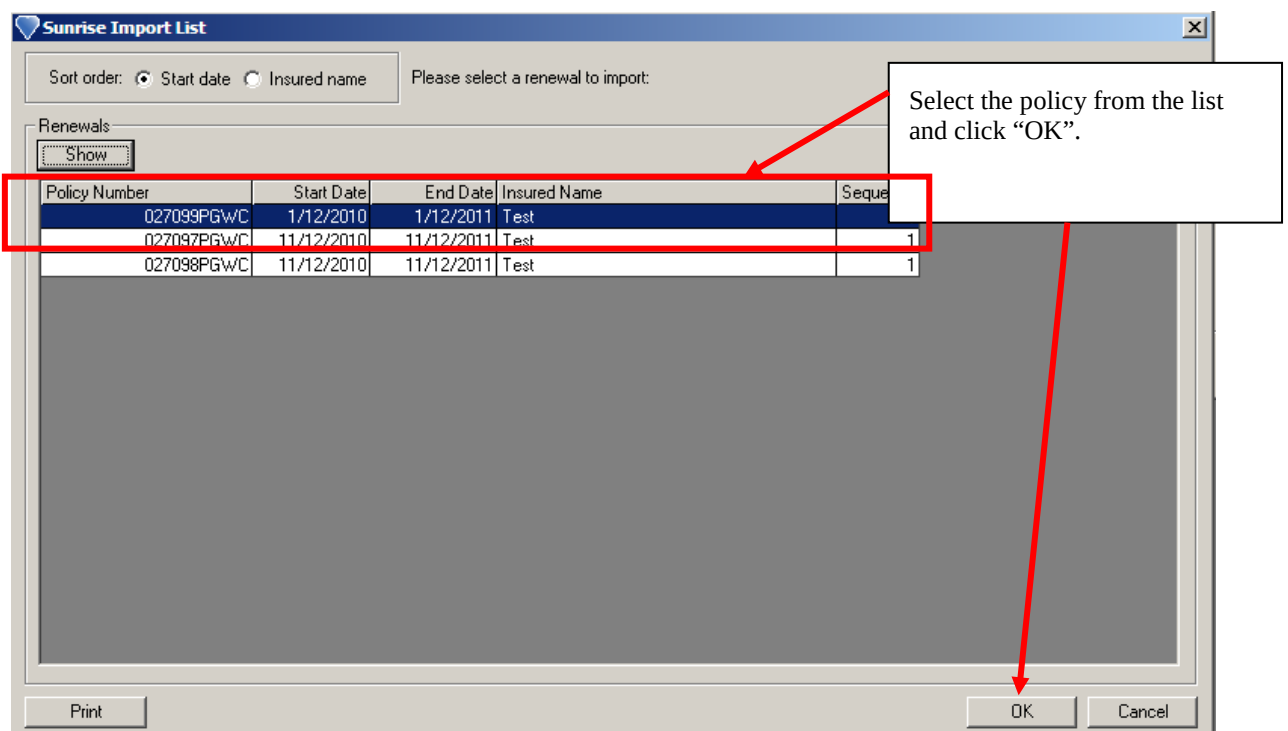
Renewal is a function available within ZStreamXpress that allows users (both internal and Brokers) to review, accept or decline the next term of a policy.

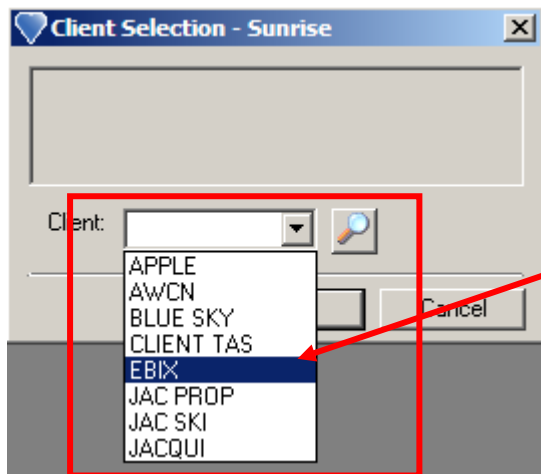
The steps in this document are looking at the process from a Broker's view. We have selected Winbeat as a starting point so as users have an understanding of how the Broker Management System (in this example Winbeat) interacts with ZstreamXpress and the Renewal process.

2.1 Workers Compensation Screen Shot Example

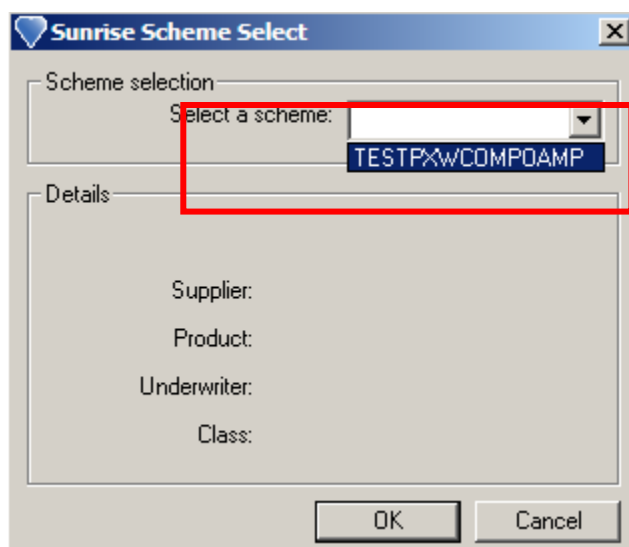
The following is an example of how of how a Broker is able to transact a renewal from the Winbeat system.

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?

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			
ITC (%)	100		

Mailing Address

Unit / Floor / Building / PO Box	PO Box 203
Street Number	
Street Name	
Suburb / Postcode Search	
Suburb	SURREY HILLS
State	VIC
Postcode	3127

Business Address

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

Contact Details

Contact name		Business	
Email address	winbeat@ebix.net.au	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 - [ZstreamXpress 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* 027096PGWC

Occupation details

No.	ANZSIC	Industry	Est. emps	Est.
1	15201	Other mining services - offshore	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	Cms paid	Outstanding	Large Loss No. Cms	Large Loss

< Previous Calculate Add Comment Add Referral Next >

2.11.2

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

TESTPXOAM - WinBEAT 3.1.62 - [ZstreamXpress 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

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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 - [ZstreamXpress 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

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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 - [ZstreamXpress 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

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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".

TESTPXOAM - WinBEAT 3.1.62 - [ZstreamXpress 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

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Complete

Policy details

Policy period 01/12/2010 to 01/12/2011

Policy effective date 01/12/2010

Valid to 19/02/2011

Close now No

Closing number

Insured details

Client ref EBIX

Insured name EBIX Australia Pty Ltd

Premium details

Rating option Conventional

Number of installments N/A

Version

Class	Rate	Base Premium	GST	Stamp Duty
ANZSIC (15201)	8.02%	\$1,500.00	\$150.00	\$0.00
Total	8.02%	\$1,500.00	\$150.00	\$0.00

Documents available to print

Document Name	Document Availability
☐ Renewal Invitation (PDF)	On Complete
☐ Renewal Invitation (PDF)	On Accept
☐ Proposal (PDF)	On Complete
☐ Declaration of Wages and Earnings (PDF)	On Accept

2.11.2

< Previous Done Next >

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"

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

Sunrise Finalisation

Confirm Confirm the transaction.

Refer Refer the transaction.

Product Return to the product.

Suspend Suspend the transaction.

Abandon Abandon the transaction.

Click "Confirm"

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):

Transaction
Close

Client
EBIX
Telephone: (03) 9899-3388
Primary Contact: Ms Kiersten Lethbridge
Contact Phone:
Contact Mobile:
Client Group: Not Applicable
Account Manager: Office Account
Sub-Intermediary: No Sub-Agent
Balance: \$69,018.36
Unallocated: \$0.00
Outstanding: \$69,018.36
EBIX Australia Pty Ltd
PO Box 203
SURREY HILLS VIC 3127
Compliance Type: Unknown
Contacts

Policies
Show ☐ All ☒ Live ☐ Outstanding

Class	Underwriter	Policy Number	Inc	Start Date	End Date	Status	Amount	Balance
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

Process Transaction

Reset

Close

Select Close transaction and Client code, then click “Show”. The renewal invitation should appear in the list. Select the policy and click “Process Transaction”.

ZstreamXpress is then launched.

TESTPXOAM - WinBEAT 3.1.62 - [ZstreamXpress 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®

Policy
 Business Details
 Extensions To Cover
 Insured Details
 Rating Options
 Premium Summary
 Complete
 Tools
 Attachments
 Broker Comments

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.

TESTPXOAM - WinBEAT 3.1.62 - [ZstreamXpress 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®

Complete

Policy details

Policy period 01/12/2010 to 01/12/2011
 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
Total	8.02%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Documents available to print

Document Name	Document Availability
☐ Certificate of Currency (PDF) customise...	On Accept
☐ Proposal (PDF)	On Complete
☒ Renewal Schedule (PDF)	On Accept
☐ Deduction of Wages and Earnings (PDF)	On Accept

< Previous Done Next >

2.11.2

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

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	Large Loss To
10/10/2008	10/10/2009	1	\$65,000	0	\$0	\$0	0	

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

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

Click 'Save'

Z.streamXpress 2.13.1 - Windows Internet Explorer

Workers Compensation

025675PGWC Renewal Import Invitation

Policy

- Business Details
- Extensions To Cover
- Insured Details
- Rating Options
- Premium Summary
- Complete

Tools

- Attachments
- Broker Comments

Business Details

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

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	Large Loss To
10/10/2008	10/10/2009	1	\$65,000	0				

2.13.1

Previous Calculate Add Comment Add Referral

The policy needs to be calculated.

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

Policy

- Business Details
- Extensions To Cover
- Insured Details
- Rating Options
- Premium Summary
- Complete

Tools

- Attachments
- Broker Comments

Business Details

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	\$185,000

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	Large Loss To
10/10/2008	10/10/2009	1	\$65,000	0	\$0	\$0	0	

2.13.1

Previous Calculate Add Comment Add Referral Next

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

2.13.1 - Windows Internet Explorer

Workers Compensation
025675PGWC Renewal Import

Policy

- Business Details
- Extensions To Cover
- Insured Details
- Renewal Options
- Premium Summary
- Complete**
- Tools
- Attachments
- Broker Comments

Complete

Policy details

Policy period 10/10/2009 to 10/10/2010
Policy effective date 10/10/2009
Valid to 31/03/2011
Close now Yes
Closing number

Insured details

Client ref Hover-LT
Insured name Hover Holdings Pty Ltd

Premium details

Rating option Conventional
Number of installments N/A

Version

Class	Rate	Base Premium	GST	Stamp Duty
ANZSIC (61100)	5.01%	\$9,268.50	\$926.85	\$0.00
Total	5.01%	\$9,268.50	\$926.85	\$0.00

Documents available to print

Document Name	Document Availability
☐ Proposal (PDF)	On Complete
☐ Certificate of Currency (PDF) (customise...)	On Accept
☐ Renewal Schedule (PDF)	On Accept
☐ WA Declaration of Wages and Earnings (PDF)	On Accept

Policy status

Transaction Type Renew
Status Compl

Renewal Invitation delivery

Renewal Invitation delivery method Postal Mail

< Previous Done Next >

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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