

Wrightway Renewals Quick Notes is designed as a quick reference guide to help you process renewals for Wrightway, using the Full Cycle Renewals software.

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Introduction

All Brokers can now receive Wrightway Renewal invitations direct from Wrightway, confirm and lapse these policies electronically, in addition to printing both Renewal and Point of Sale documentation.

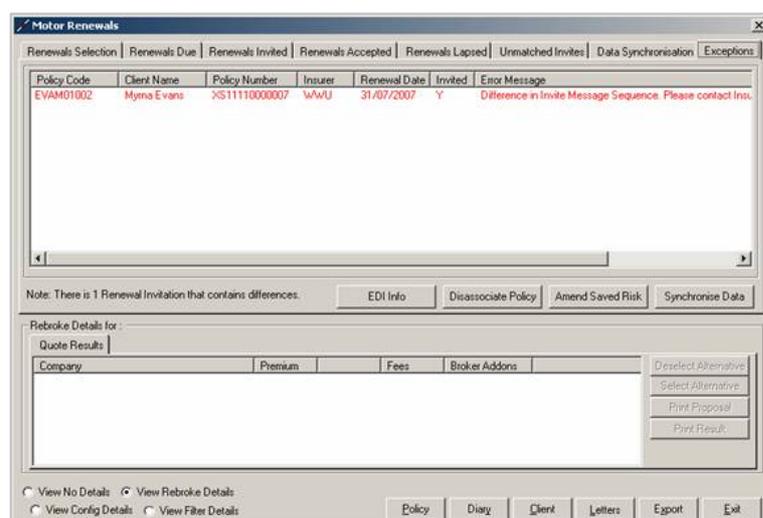
Renewal processing, including the production of Renewal Invitation and Proof of Bonus documents, is currently available for the following schemes:

- ✓ Wrightway Ltd
- ✓ Wrightway Elite
- ✓ Wrightway Choice 1 & 2

This document outlines any unique features that Wrightway Renewals processing employs.

New EDI Info Button

Your system records EDI messages sent to Insurers during the course of the year, logging the sequence number for each transmission. For cases where you have processed an MTA around the renewal period, Wrightway may not yet have received the MTA details before issuing the Renewal Invite.



When processing Wrightway renewals, the system will initially validate these sequence numbers, and if it looks like an MTA has been performed in the interim, will flag these up on your screen, as shown left.

Any such entries will be displayed in red.

In such a case, you will need to contact Wrightway with the details (see overleaf for details on **Validating Message Sent**).

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Validating Messages Sent

To enable you to investigate and inform Wrightway of where the difference is; we have added a new **EDI Info** button. Highlight the policy in question, and click on this button to display the **EDI Message Info** screen, as shown below.

EDI Message Info for Policy Code : KIND05001

Broker		Insurer	
EDI Msgs Sent :	3	EDI Msgs Received :	2
Last EDI Msg Type	MTA	Last EDI Msg Type	MTA
Sent :		Received :	

History Info

Date	Description	Effective Start Date	Effective End Date
24/05/2006	New Business Accepted	24/05/2006	23/05/2007
24/05/2006	Permanent Mid-Term Adjustm...	24/05/2006	23/05/2007
06/06/2006	Permanent Mid-Term Adjustm...	06/06/2006	23/05/2007

Difference in Invite Message Sequence. Please contact Insurer.

Close

This example shows that although the broker has transmitted 3 EDI messages to the Insurer, at the time the Invite was issued, the Insurer had only received 2 of these.

Wrightway will advise whether this policy should be taken off Full Cycle, or whether they will issue a new Invite.

Wrightway Renewals – Unique Features

The biggest difference between processing renewals for Wrightway and for other companies is that **Wrightway Renewal processing is currently only available for policies inceptioned using the Full Cycle system.**

- ✓ This means that **you will not need to validate your data against Wrightway's Invite**, which in turn means that you do not need to use the Synchronise Data option. To this end, the Undo Data Synch option has also been disabled for Wrightway renewals.
- ✓ **You should not process any MTA's the day before renewal only do so after you accept the renewal , then process the MTA**
- ✓ **The only exception to this is that you will need to manually add Claims details** whilst renewing the policy, as the Wrightway Renewal Invite does not contain this information. This will ensure that at renewal, you will have the most up to date claims information available.
- ✓ **If you want to change any other details at renewal**, for example, including Addons or changing any risk details other than claims, you should **use the MTA option** as described below, **after** confirming the Renewal Invite details received from Wrightway, and rebroking the policy.

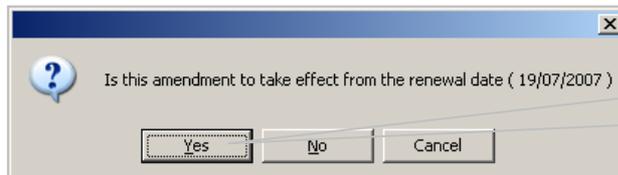
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Renewals Due Tab - Changing Wrightway Risk Details at Renewal

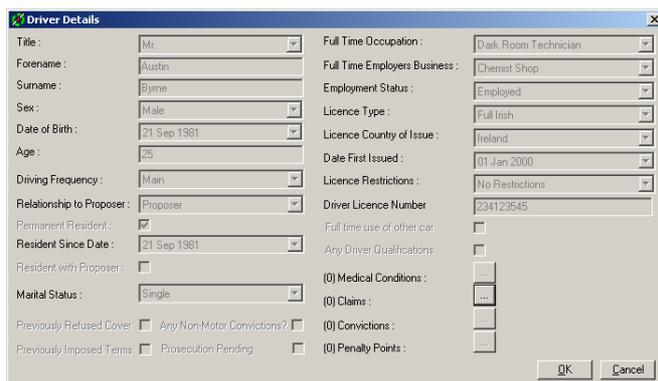
To change either the Claim or any other details during renewal, select **Amend Renewal Risk** from the **Renewals Due** tab in the normal way.

This will load up the results screen, and from here clicking **Back to Quote Details** will access the main risk screen. If you select to amend the risk details, you will be prompted as follows.



If you select **Yes**, you will see the following alert advising that the only information that can be amended is claims information.

Click **OK**, and you will see that the only risk item on the screen that is accessible to edit is the **Driver Claims** button (below).

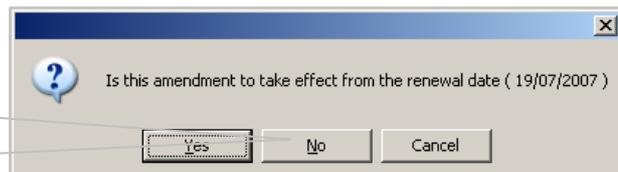


Click on the **Claims** button to input the latest claim details received from Wrightway, in the usual way.

On calculating and saving the policy, the claims changes will be added, effective from the Renewal Date.

To change any other details via the MTA option, instead of saying Yes when prompted, click on **No**.

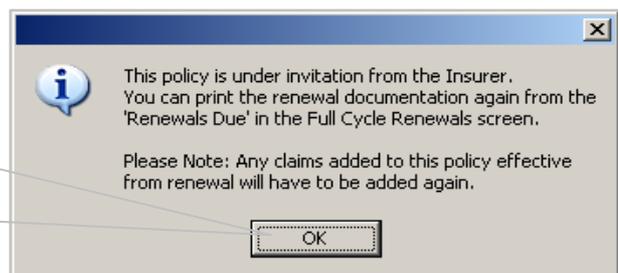
If you select **No** to this option, the system will proceed into the standard MTA Data Capture Menu and will allow you to change the risk details, using the Permanent or Temporary Adjustment options.



NOTE: The Claims details that Wrightway provides should always be added effective from the Renewal Date (by answering Yes to the prompt shown above).

If you have added the Claims Details in as advised by Wrightway, and subsequently perform an MTA, you will need to re-enter the Claims Details, after doing the MTA.

Upon completion of a Permanent MTA, you are reminded of this.



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Renewal Invited / Accepted Tab

At this stage, you will have already invited the risk, having added the claims details as advised. It is assumed therefore at this stage that the Renewal details for Wrightway are correct.

You can now click on the **Renew / Amend Risk** option and either **Renew** or **Amend** this risk.

Renewing the risk with Wrightway

Clicking on **Renew / Amend** will display the Quotes Results screen.

To **renew** this policy for Wrightway, simply highlight and **Accept** the quote from here in the normal way.

As already stated, you cannot change risk details (other than Claims) at renewal for Wrightway renewals. If you do want to make changes to the Wrightway policy after the renewal has been invited, you can do one of the following:

1. Regress this Invite back to the Renewals Due tab and make the changes as previously described
2. Accept the risk for renewal as it stands, and, after the renewal has been processed, perform an MTA in the usual way (recommended).

Amending the Risk Details at Renewal

Clicking on **Renew / Amend** will display the Quotes Results screen.

Changing any of the risk details at this stage will denote that you do not wish to renew with Wrightway, and that you wish to place cover with an alternate Insurer as New Business.

To do this, go back to the Quote Detail screen and amend the risk details from there. You will again be prompted whether the amendment should take effect from the Renewal Date.

Selecting No will allow you to process an MTA as already described.

Answering Yes, will prompt you with the following:



If you click **OK**, you will be taken into the results screen. From here, you can change the Risk Details and accept an alternative Insurer for New Business

Note that the premiums produced on calculating this will be New Business premiums.

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Quick Wrightway Renewals FAQ:



How do I synchronise data for Wrightway / The Undo Data Synch button is missing

In short, you don't need to. Wrightway's Renewal Invite will contain all of the most up to date risk information, apart from Claims, which you will need to input as already discussed. And since you don't need to synchronise the data, you don't need the Undo Data Synch button.



The Invite sent by Wrightway does not contain Claim Details; how do I add a client's claims?

After New Business processing a claim can be input on the risk for a non-disclosed claim that occurred prior to inception. This is unchanged.

Claims are not sent in the Renewal Invite message – you will need to input these manually – in the Renewals Due tab, amend the Risk Details option, select that you want the changes to be effective from the Renewal Date, and you can enter claims details for each driver.

If you subsequently do an MTA, you will need to enter these Claims Details again.



When I calculate the Renewal Quote, it declines or refers

Take note of the reason and contact Wrightway to discuss why their products are not quoting.



How do I change the Risk Details at Renewal Acceptance?

Wrightway does not permit any changes to risk details - other than the Claims changes they will advise you of - at Renewal Acceptance.

Make sure that claims are added, accept the Renewal as it stands, and perform an MTA to change the risk details, after the renewal has been processed.



How do I override a premium or referral at Renewal Acceptance?

Wrightway does not permit Broker or Referral overrides at Renewal Acceptance – all queries on this should be directed to Wrightway.



How do I include an Addon at Renewal Acceptance?

Addons cannot be added at Renewal Acceptance.

The option to include an Addon within 5 days of Renewal or New Business Acceptance is available as an MTA option.



How do I reprint the Renewal Invitation?

As with the other letters on your system, a copy is saved in the Documents Tab for the relevant client, and can be printed from there.

The Gas Office 12 Cromac Quay **Belfast Office**
T +44 (0) 28 9092 1500 F +44 (0) 28 9092 1900
Belfast BT7 2JD
E info@relay.ie

10/11 Exchange Place IFSC Dublin 1
T +353 (0) 1 662 3112 F +353 (0) 1 662 3102
Dublin Office
E support@relay.ie

Web www.relay.ie