

Suggested Conversion Time Line

InStar to Agency Systems Conversion

WHEN	TASKS
Agency Systems receives signed software contract and payment	<ul style="list-style-type: none"> - Agency sends completed software contract and payment to Agency Systems - Agency sends completed conversion contract and payment to EDI Concepts (EDI) - Agency Systems software is setup and sent to the agency or hosted company - Agency is contacted by Install team (if not hosted) - Agency completes install of software - Training unit setups tentative dates for training
EDI Conversion Team receives signed conversion contract and payment	<ul style="list-style-type: none"> - Agency completes information request form from EDI - EDI contacts agency to get first copy of the Isdata and other related files.
Conversion Process Review Within 2-3 weeks	<ul style="list-style-type: none"> - EDI performs the InStar data extractions and processes the data in prep for training data - Agency Systems contacts the agency for setup. <p><i>Live date – this is generally performed over a weekend or evening to minimize down time.</i></p>
On-going conversion and training begins	<ul style="list-style-type: none"> - Trial conversion and training data is received at agency – training and data testing begins - Agency reports any data errors to EDI to correct prior to running final conversion - Form letters in Agency Systems are reviewed and merge code fields are added if desired
Training Begins 2 – 6 weeks	<ul style="list-style-type: none"> - Agency Systems has a comprehensive well organized successful training program that works one on one with their agencies. Your training schedule is set once the trial conversion is run. - Agency begins training
Conversion Live Date 6 – 12 weeks	<ul style="list-style-type: none"> - EDI picks up final Isdata and related files for final conversion - From this point on, no further work is processed on InStar, although the system can be left running for reference purposes - The conversion is finalized by EDI and downloaded to the agency - Accounting training is completed the first month of being live.