Conversion Review Manual
For InStar Agencies
Steps to a Successful Conversion

Conversion is the term used for moving data from your InStar system into Newton. This document reviews the steps involved in a conversion.

The conversion picks up current client detail, letters, emails, edocs, follow-ups, and notes. Policy header records are built from the InStar policy header for each policy in InStar with the exception of non-ACORD policies such as; misc personal, misc commercial, and life/health policies. These policies will have a policy record created.

In addition, Agency Systems will convert company, producer, and user information.

You are given the option of converting prospects and/or inactive files. The default is to convert these items.

There is no accounting conversion. See details following regarding accounting.

Commercial lines policies have history built from the ACORD application within the InStar system. This will give you policy detail including; drivers, vehicles and property schedules. Currently the ACORD 125 is not being built from the conversion. Training will help you facilitate the correct workflow for your agency in creating this data.

For personal lines policies that you are not be downloading with today, it is recommended that you request an initial load from those carriers.   This will give you the maximum functionality within Newton. The conversion picks up the downloaded details and creates the DL Risk Viewer inside Newton giving you maximum knowledge of your clients.

Please contact your sales representative immediately if you see that this process would be unacceptable to your agency.

Setup Steps:

Step One: *This step is skipped for any agency that is hosted*. Agency Systems will have contact you immediately to review your agencies specific needs. After the implementation conference, you will have and install appointment with our technical team. Setup is completed prior to conversion.

Step Two: EDI Concepts will work with you to get a copy of your InStar data file and other associated files. This will then be used to prepare a trial conversion. The trial data will be used for training. Trial data must be reviewed for any anomalies that you would like to change prior to the final conversion/live date. Once Newton setup has been completed, your trial data will be placed into Newton on your server.

Step Three: Agency Systems will be working with you throughout the implementation and training process. We will do everything possible to help you achieve the "go live" date you requested.

Step Four: Please contact each carrier you have downloading to InStar and advise them that you are "changing" systems and give them your expected "go live" date. For those carriers that you do not download with presently, you may wish to request an initial load to be sent to you immediately following your go live date. This puts your data in sync with those companies.

Step Five: For the final conversion just prior to going live with Newton, EDI Concepts will set up an appointment to get your InStar data. All further transactions with InStar should be stopped at that time. EDI will convert the data and place the newly converted data into Newton. From this point on InStar should only be used for lookup purposes, and all other agency related processing should be done using Newton.

Step Six: Agency Systems final setup steps will be done. Accounting will enter beginning balances and the agency will complete training in all aspects appropriate for their needs.

Codes:

Note: During conversion, your InStar user codes and passwords are entered into the profile area. For anyone using more than a six digit password, they will use the first six digits to login to Newton. Passwords are in “All Caps.”

The InStar to Newton conversion imports the CSR, Producer, Line of Business, Department, and Company codes found in your InStar Setup areas. You will have been given instructions on checking your InStar system prior to your final conversion being run.

During training, you might determine that you wish to make some modifications to imported codes, please make these changes in InStar before the final conversion process so they are not overwritten.

Company: Agency Systems will take the sub company and company codes from InStar and convert them all to the Newton’s Company Profile area. Newton will use the Sub Company name for your policy detail. If there is no sub company code, Newton will pick up the main company code. Company codes will be truncated to three characters.

You will have a new company code for each sub-company, and you will be shown during training how to “combine” your company codes so your reporting appears correct.

Line of Business: Agency Systems will use the line of business codes as you have them set up in InStar, except that they are truncated to the first three characters. Please see the example below:

InStar Code	**Description**	**Newton Code**
GACC	*GROUP ACCIDENT / TRAVEL ACCIDE*	*GAC*
PAUTO	*PERSONAL AUTOMOBILE*	*PAU*
CAVIA	*COM'L AIRCRAFT*	*CAV*

You will want to follow closely the trial conversion checklist as any changes to LOB codes should be done on InStar prior to conversion then on Newton after conversion is complete.

Producer/Producer 2/CSR: These codes will be truncated to three characters, policy header and client information window changes will be made at conversion. Please see examples below:

Prod Code	Name Associated	Newton Code
BILLY	*Billy I Producer*	*BIL*
JOHN	*John A Jones*	*JOH*
House	*House Account*	*HOU*

Clients/Prospects/Inactive Client Files: All of these files will be converted unless you otherwise advise the conversion coordinator.

Note: You may want to consider how you would like inactive and/or prospect files converted. If you have hundreds of inactive files, you might decide that it is best not to bring that information over. However, if you use inactive for a lot of “lookup” features such as vendors, etc. you might want to have these files brought over.

Client Information Window:

Name/DBA or In Care of/Address/Phone Number/Fax Number: The name, DBA or In Care of, address, phone number, and fax numbers in the InStar Client Information Window flow to the respective fields in the Newton basic client window.

Contacts listed under the client contact tab of InStar will be converted into the Agency Systems contact area. If you are still using the “old” contact area in InStar, you will have a single contact added for each client. These will have to be manually corrected as you move forward.

InStar Company contacts and Company Additional Addresses will be converted to Company Contacts in Newton.

Client Names—Personal Lines InStar’s name format last name, comma, rest-of-name (Doe, John Q.) will be converted to the more conventional format in Newton (John Q. Doe).

Client Names—Commercial Line Names will be brought over to Newton as they are in Instar.

The conversion process builds your policy detail (i.e. commercial BOP or Commercial Package) from the InStar window. History details will also be built using the same method.

Commercial Misc will be converted to a policy note viewable by right clicking on the policy.

Client Number – The same number used for a client in InStar will be used in Newton once conversion is complete. (This will help during the checking of the data to determine exactly where converted information has come from in InStar).

Policy Activities

It is highly recommended that you give careful thought to the following. If you have been on InStar for many years you may not want to “over populate” your new database with historical details that can be easily access from InStar. We recommend a period of 2 years maximum.

Letters/Emails/Faxes/eFaxes: Once converted these will be appear in the client window in the attachments area.

Follow-ups: These will be placed under Newton’s To Do tab.

Notes/Top Notes: The notes from InStar will be placed in Newton’s Notes area on each client file. Top notes will have the highlight feature checked so they will open automatically whena client is retrieved.

E-Docs: Attachments will be placed in Newton’s Attachment area using the description listed in E-Docs.

Download:

See Step Four on page 1. Confirm a <u>HOLD Date</u> for the present download.

Arrange the stop and start date of your daily download. If you were not doing commercial lines download it is recommended that you begin a few weeks after the live date and consider an initial load of details. Staggering this with your carriers makes the process easier for your staff.

In scheduling this, you might find the chart located on our website helpful in keeping track of your company contacts and details. www.agencyresourcecenter.com

After Conversion

After conversion to Newton, you will be accessing your InStar system on a fairly limited basis. It is suggested that you run a complete backup (or have the hosting or remote backup service run an extra, final backup of the InStar data file to keep locally.

It is important to understand that your InStar system will remain running for you until you determine that you do not need to access this information.

Accounting – You will be provided separate instructions on how to enter your beginning balances and additional training once you go live with Newton. Agency Systems will work with you through this process and does automate some of the process.

The training and support teams are here to help! Good luck and welcome to the Agency Systems family of clients.