**Communicating System, Data, or Administration Changes to Business Partners**

Please use this form to communicate system, data, or administration changes to your business partners. Examples of applicable uses of this form include, but are not limited to, full or partial system conversions, changes to data formats, key elements or calculation fields, and data cleanup efforts. Key elements are fields such as treaty codes, plan codes, smoker codes, rider numbers, or underwriting ratings. Calculation fields are those that affect the business transaction such as premium, amount at risk, or flat extras.

The questions in this form are not asking for the minute details of the changes but rather information that your business partners need to ensure a smooth transition on their end. The form is also meant to be a catalyst for open dialogue between you and your business partners and to give you an idea of what they are interested in when these changes occur. With that in mind, please be sure to provide timely notification of the change as soon as possible, keeping in mind the extent of the change. Also, provide a timeline, contact information and subsequent notifications on progress, issues or delays. You are encouraged to use this proactively as that will bring efficiencies to your processes. If this form is filled out and provided to all of your business partners as the initial notification of the change, then not only will it reduce the number of questions you receive from your business partners but it will also result in not receiving this form from all of your business partners in response to a general notification. You can utilize this form for subsequent notifications as well.

When responding to the form, please attach any documents that would be helpful or are necessary. Documents can be attached as embedded objects on the last page and referred to in your responses.

Also, feel free to use this form to communicate to all of your business partners for the current change and any future changes.

**Complete the form below and share it with your Business Partners.**

Company: Click here to enter text.

Representative: Click here to enter text.

Date: Click here to pick a date.

1. Please provide a brief summary of the change below.

Click here to enter text and paste screenshots.

1. What is changing – Reinsurance Admin System, Direct Admin System, Data Elements, other?

Click here to enter text and paste screenshots.

Are there changes to the data file format (please provide documentation for the layout and code descriptions)?

Click here to enter text and paste screenshots.

Are there changes to key elements (fields such as treaty, plan, policy number, original policy information, smoker codes/preferred indicator, mortality ratings, age/DOB changes, name fields, reporting of riders, reporting of joint information)? Please provide detail below and also applicable documentation such as plan descriptions and “old to new” documentation.

Click here to enter text and paste screenshots.

Are there changes to calculations fields that affect the reinsurance?

Click here to enter text and paste screenshots.

1. Is the change a data cleanup effort? Or is there a data cleanup effort taking place as part of a larger change? Please provide detail below.

Click here to enter text and paste screenshots.

1. Is this a phased change or is it happening all at once? Please provide detail below.

Click here to enter text and paste screenshots.

1. Does the change affect all the business ceded to the reinsurer or just a portion of it? Please provide detail below.

Click here to enter text and paste screenshots.

1. Any special handling of business during the conversion/change? Please provide detail below.

Click here to enter text and paste screenshots.

1. Currently your company provides:

Business Partner to include list of current files/reports received HERE

Post the change, will the same reports and data files provided in the past continue to be provided? Will there be any additions/changes?

Click here to enter text and paste screenshots.

1. What impacts do you anticipate with this change? Please provide detail below

- Claims impacts?

- Premium Accounting impacts?

- Reporting nuances?

- Other?

Click here to enter text and paste screenshots.

1. Are there existing reporting issues that will be corrected? For example, a constraint in the old system that caused incorrect reporting that will now be correct in the new system. Or a change to or addition of exception processing. For example, a manual workaround that no longer exists or has been introduced because of this change. Please provide detail below:

Click here to enter text and paste screenshots.

1. What other benefits may result from this change?

- Electronic delivery for billing, inforce, claims, reserves, fac documentation, etc.

- Enhanced shock lapse (post level term) administration

- New contacts or channels for inquiries

- Reduction of manual processing for the ceding company administration

- Accurate retention management for the ceding company administration

- Other benefits

Please provide detail below.

Click here to enter text and paste screenshots.

1. Either independently or as a result of the noted changes, are there any process changes related to the following items?
   1. FTP site
   2. ACH or Wire payments or remittances
   3. Submission or processing of claims
   4. Changes to administrative business rules that could affect reinsurance administration
   5. Other

Please provide detail below.

Click here to enter text and paste screenshots.

1. Can the reinsurer/retrocessionaire assist?

- Test plan

- Validating data/reports

- Assist in data clean up

Please provide detail below.

Click here to enter text and paste screenshots.

**Attachments**

(any number of attachments can be included below…please follow the format shown below and refer to the attachments in your responses above)

[Ctrl+Click here to see how to insert a file as an embedded object. Be sure to select the **Display as Icon** check box.](http://office.microsoft.com/en-us/word-help/insert-information-by-creating-a-linked-object-or-embedded-object-HP005190159.aspx)

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