



## **EDI GUIDE FOR OPEN GI CV USERS**

### **Now you have been switched on**

Sabre do not accept manual business from Agents with Full Cycle EDI Systems, unless there are exceptional circumstances, for example: - a refer case which cannot be quoted on your system.

### **Frequency of Transmission**

New business, mid term adjustments and renewals processed by your Agency MUST BE TRANSMITTED DAILY. Insurers need to adhere to strict timescales for submission of data in order to meet targets set by the MIIC for the Motor Insurers Database.

### **Storage of Documentation**

You must keep the new business proposal form, a copy of the original quotation, cover note(s) if issued, NCD proof, copy of driving licence and any other relevant documentation. The use of optical disk or other storage media is usually acceptable to us but prior agreement must be sought before any documentation is destroyed.

The documentation must be kept available for audit purposes. All papers must be kept for at least two years after the policy has been cancelled or lapsed.

### **Access to Documentation**

Access to documentation must be available to us, or an authorised third party for audit purposes whenever required.

There may be instances where we require the original new business documentation to be submitted to our office or handed to an authorised third party. Any requested papers must be readily available.

### **The following transactions can be sent to Sabre via EDI Transmission:**

New Business  
Permanent Mid-Term Adjustments  
Temporary Additional Vehicles  
Temporary Additional Drivers  
Renewal Confirmation or Lapse  
Cancellations  
Not Taken Up Policies

### **Scheme Codes**

- SCVE – Sabre CV (Full Cycle)

### **New Business**

- New Business & continuation cover notes are available.
- Please retain all documentation.
- If the risk has been referred to us for a quotation, please override the premium and enter the quotation reference in the quote reference field.



### **Mid Term Adjustments**

Please do not send paperwork to us, unless there is a query on a transaction that has already been transmitted to Sabre, or you are unable to process the change on your system. All paperwork should be retained in your office with the new business documentation in case of a query or claim.

### **Cancellations**

- Please note cancellation refunds will be calculated by the Open GI system. Please ensure that you check that you have not been advised of claims during the current period before passing the refund to the client.
- Cooling Off Period – If the policyholder requests cancellation within 14 days of receipt of full documentation following inception of a new business or renewal, this will be treated as a right to cancel with a small charge of £25 + IPT applying for the period on cover.
- Cancellation Calculation – A pro rata charge for the period on cover, plus £50.00 will apply following any request for cancellation.

### **Renewals**

Renewal invitations are at present issued by Sabre, in the form of a paper document. If renewed with Sabre, the policy must be renewed on your Open GI system and point of sale documentation produced. If the policy is not renewed on your system within 1 day, the policy will lapse automatically and a lapse confirmation message will be sent to Sabre the next time messages are transmitted (full procedures attached).

### **Other Points**

- Please submit Transaction Audit Reports on a monthly basis.
- If you require policy wordings, these can be downloaded from [www.sabre.co.uk](http://www.sabre.co.uk)
- If you are having transmission difficulties, please keep us informed, we may be able to help.
- If you require an Override code, please phone the Underwriting Department on the number shown below.
- If the premium is to be paid by credit card, a payment form must to be completed and submitted via [www.sabre.co.uk](http://www.sabre.co.uk) or the details phoned through to Sabre on 01306 747261.
- If you have any problems or questions, please give us a call – we will try to help.
- Green Cards – please contact Sabre 10 working days before travel date if a green card is required.

### **Contacts - queries**

<b>Contact</b>	<b>Telephone/Fax</b>	<b>Email</b>
Electronic Trading	Tel: 01306 747276 Fax: 01306 501111	<a href="mailto:electronictrading@sabre.co.uk">electronictrading@sabre.co.uk</a>
Underwriting	Tel: 0330 024 4699 Fax: 0330 024 4698	<a href="mailto:underwriting@sabre.co.uk">underwriting@sabre.co.uk</a>

*Call costs may vary depending on your service provider. If phoning from a mobile please check with your mobile operator. All our calls are recorded for training purposes.*



## Full Cycle Renewal Procedures

Sabre issue manual paper renewal invitations for both Manual and EDI policies. Upon receipt you must check these against your system to establish whether the policy is a full cycle EDI case or not.

Policies that are not full cycle EDI should be lapsed and a new business submitted on a full cycle basis, if renewal is required. Sabre will stand by the premium invited on the renewal notice providing that the risk details have not changed.

Full cycle renewals need to be confirmed on your system otherwise the policy will be lapsed automatically after 1 day. To process the renewal confirm you must have the renewal documents in front of you as you will need to input the renewal premium and NCD into your system and check the excesses and endorsements that apply (amending these as necessary from the details supplied on the Renewal Invitation).

From the **Brooms** policy record select the mid term adjustment facility (**ESC 5**) and then the **RENEWAL MENU**: -

1. Select **Renewal Override** and input the required data.
  - **Renewal date and time** - ensure this is taken from the invitation issued by Sabre.
  - **Expiry date and time** - ensure this is taken from the invitation issued by Sabre.
  - **NCD** - enter the number of years from the invitation issued by Sabre.
  - **NCD Protection** - ensure this is taken from the invitation issued by Sabre, if this benefit is not included and is required please contact Sabre for an amended renewal premium.
  - **Renewal Premium** - includes the IPT and is taken from the invitation issued by Sabre.
  - **IPT rate** - enter the current IPT %.
  - **Endorsements** - these are added as a **NUMBER** and taken from the invitation issued by Sabre.
  - **Loading** - this is for an additional % loading to be applied if instructed by Sabre.

From the **Brooms** policy record select the mid term adjustment facility (**ESC 5**) and select the **RENEWAL MENU**: -

2. Select **Renewal Notice**, this produces a renewal notice - broker copy only.

This document must be checked to ensure that the data input matches the invitation produced by Sabre, if its wrong return to the **Renewal Override** option and re-key the data correctly.

**Note:** Any excess shown is applicable to the LAST policy period.

3. Select **Renewal Acceptance** and then select **Excess Override**:
  - **Excess** - these are taken from the invitation issued by Sabre and added as:  
**AD excess = ????**      **Fire & Theft excess = ????**

The windscreen excess is **NOT** to be overridden.

**Note:** Excess shown will not include any driver(s) excess.



4. Select **Accept Renewal** – this produces an agent’s advice notice.

This should only be used if the policy is to be **RENEWED**. The agent’s advice note clearly states that Sabre’s renewal certificate and schedule should be used. There is also an option to print a cover note for a maximum of 30 days, if required.

5. If the policy is to **LAPSE** from renewal, the Open GI system will send an EDI Lapse message automatically, 1 day after renewal date, if the policy has not been **ACCEPTED**. A renewal must be confirmed on or before renewal date to avoid being lapsed automatically.