

Making News at BAIS

Message from Managing Director – Jim Armstrong

Firstly, we would again like to acknowledge the impact that the system not being fully available for a couple of days during the last week of June had on some of our Bureau users. It was a difficult time for everyone and we appreciate the support that we received during the outage. While the internet issue was beyond our control the team here worked very hard to provide as much functionality as we could with workarounds wherever possible.

This outage was a result of an administrative error by our ISP. Part of the delay in getting the system back up was the interaction between the various players as they had recently outsourced some of their infrastructure to Telstra.

As a result, we have now taken action to move our internet connection to a direct supplier to ensure better response times and reduce the likelihood of a similar event. The connection is ready and we are just waiting on a new Firewall to arrive so that this can be configured and activated.

Because much of our infrastructure has already been replicated on Amazon over the last year, we were able to maintain access to a significant amount of our functionality during this outage. We will continue to push hard to complete the remainder of the move to Amazon in the coming months.

In other news...

We continue to deal with the changing instructions in relation to the NSW ESL backflip. We have released updates to documentation to remove the original Section 30 notice and replace it with a new one showing a premium comparison of Last Year and This Year for renewal transactions only. This document was made available at the beginning of July and has now been activated by many clients. (More details pg 3)

Recently we launched the first of our YouTube training videos – links to these are on pg 3. Over time we plan to move all training documentation into this format.

We continue to be very busy on the development front with more and more of our clients wanting online and responsive design solutions to offer to their clients.

Logging Support Calls

We still receive a lot of Support Calls via email which then requires the issues to be logged before the Support Team sees them in their queue.

Did you know that you can log Support calls yourself which puts them directly into the Support queue?

To log your own support calls simply click on the icon:



on the Home screen in ibais. The system will then display a list of any current open calls that have been logged by your UserID using this icon. (Note calls logged by email and phone will NOT be visible to you in this list). You have the option to select an existing call and update it (eg. add more information or ask a question about it), or you can log a new call.

A screen is then displayed where you can input all the relevant information the Support Team will need to begin investigating the issue, and you can add attachments if you have a screen shot or example to include. The more detail you provide the more quickly and easily the Support Team can address the issue.

Once you submit the details you will receive an email summary of the issue logged along with the Support Call number for future reference, and the Support Call will then be visible in your list when clicking on the Log a Support Call icon.

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Did You Know?

Handy Hints & Tips

Date Fields in ibais

When entering dates in ibais there are several short cuts you can use.

The date can be typed in full:

31/08/2017 or 31 08 2017

However you can also drop the year and the system will automatically use the current year so you can type:

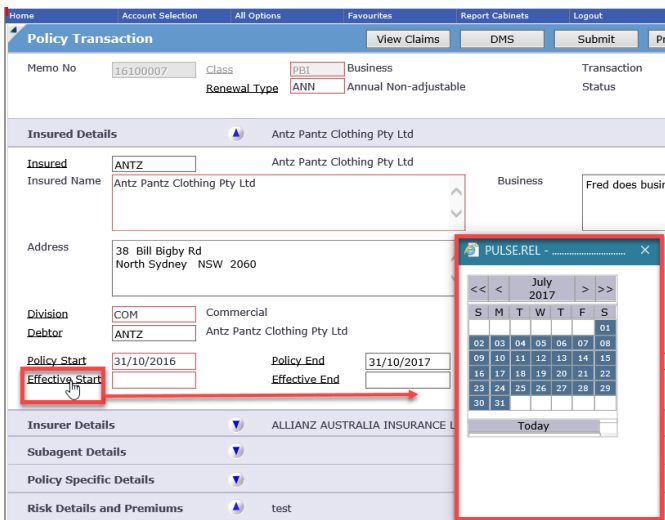
31/8 or 31 8

and the system will convert it to 31/08/2017

In addition you can type +nn or -nn (where nn is a number) to add or subtract that number of days to/from today's date. Eg if you type -1 in a date field on 31/08/2017 the system will convert it to 30/08/2017.

Inputting the letter 't' into a date field will be converted to today's date.

Finally - There is a calendar Look Up function available by clicking on the Date field hyperlink:



Colour Key

The ibais system allows for easy recognition of the status of transactions by providing a variety of colours to denote certain information.

Red on a dollar amount denotes an overdue debt:

Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
I6294	935.99	0.00	845.24	0.00
I7429	1668.59	0.00	1143.34	1143.34
I6192	288.35	0.00	256.82	0.00

Pink on a dollar amount denotes that the debtor is different to the insured and that another debtor is responsible for payment (e.g. A third party broker/subagent)

Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
I6131	110.00	0.00	0.00	0.00
I6701	1152.80	0.00	1056.55	0.00
I7526	0.00	0.00	0.00	0.00

Purple Transaction Type denotes a Quoted Premium Funding loan.

Memo No	<	Type	EndNo
17070019	<<	Pol	17003
17070019.6		End F	17002
17070019.5		Pol F	17002
17070019.4		End F	17001
17070019.3		Pol Q	17001
17070019.2		End	17000
17070019.1		Pol	17000

Blue Transaction Type and Invoice Number denotes a Converted Premium Funding loan.

Memo No	<	Type	EndNo	Referred	Invoice
17070019	<<	Pol	17003	Ne 4/07/18	I7307
17070019.6		End F	17002	R 007/18	I7306
17070019.5		Pol F	17002	Ne 4/07/18	I7333
17070019.4		End F	17001	R 007/18	I7232
17070019.3		Pol Q	17001	Ne 4/07/18	I7211
17070019.2		End	17000	R 007/18	I7210
17070019.1		Pol	17000	Ne 4/07/18	I7208

Yellow Memo Number indicates there is a transaction Suspended on this policy.

Active and Expired Policies			
Memo No	>	Type	Risk Description
14030005		Ins	COM Fire
14030003		Pol	PBI 123 Pacific Hwy, North S
14020020		Ren	COM Fire
14020019		Ren	COM Fire
13120003		Pol	FEE Fee Only

Training Channel

ibais Training Videos Available on YouTube

New training videos have been uploaded to our YouTube channel: [Click here to access](#)



Zero Cash Receipt Allocations

Allocation of Debits and Credits on the same Client/Debtor or Creditor account.

[Click here for Training video](#)

Multi Debtor Allocation

Allocation of debit on one client/debtor code to credit on another client/debtor code.

[Click here for Training video](#)

Checking Outstanding Balance and Payment Details

How to locate details of amounts received from debtor and paid to creditor and the dates these amounts were received or paid in relation to a particular invoice.

[Click here for Training video](#)

Deposit Slip Print/Reprint

How to produce a deposit slip for receipt of cash, cheque or other tender types requiring a deposit slip to be taken to the bank.

[Click here for Training video](#)

Follow the links above for video training guides. Don't forget to subscribe if you would like to be notified automatically as soon as new videos are uploaded.

Watch this space.... More videos coming soon.



BAIS is a proud supporter of Feel the Magic Foundation and Camp Magic – A Place for Grieving Kids to Grow

www.feelthemagic.org.au

Ask Sheri for more info



NSW ESL Notice Update

On 30th June I sent an email to all clients advising that the new NSW ESL Notice with Last Year/This Year premium comparison table was available for implementation in your system as per the ESL Monitor's order under Section 30. This was set up in all databases (where I received replies requesting it) using the example wording available on the ESL Monitor's website.

It has come to our attention, however, that many would prefer to have your own company name and not the insurer's name as the contact at the bottom of the notice, so we have made another option available for those who would like this change.

Please log a Support Call if you want your Section 30 ESL notice altered accordingly.

Also – if you did not respond to the 30th June email, and would now like this new Section 30 ESL Notice implemented, please also log a request with the Support Team using the "Log a Support Call" icon on your ibais Home screen.

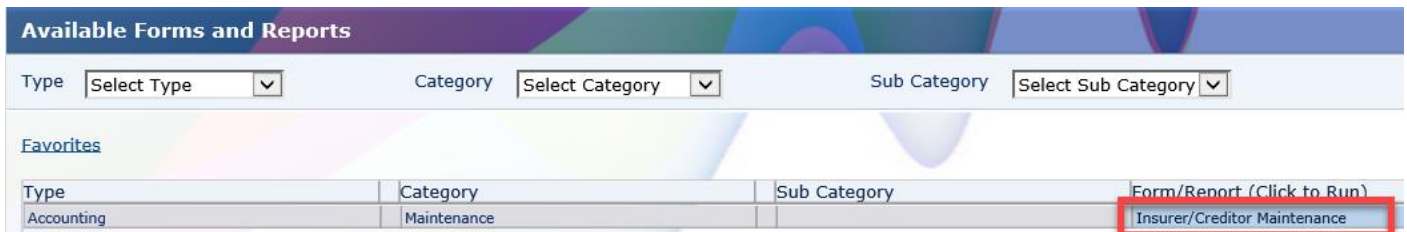
Reminder - CGU Name & Licence Change

Changes to CGU Name, ABN, ACN and AFSL

As advised in the interim edition of News@BAIS sent on 19th June - With effect from 1st August there will be some changes made to the licenced entity for CGU business as they are streamlining and transferring several licences into one licenced entity. To comply with this change, you will need to update some of the details for CGU as an Insurer in your ibais system.

It is important to note that these changes take effect on 1st August and **must not be made prior to that date**. It is recommended that you make the changes first thing on the morning of Tuesday 1st August before allowing any CGU processing to be done that day. If you have more than one Insurer/Creditor set up in your system for CGU (eg a separate code for processing Sunrise policies) you will need to update them all.

To make the changes go to Insurer/Creditor Maintenance:



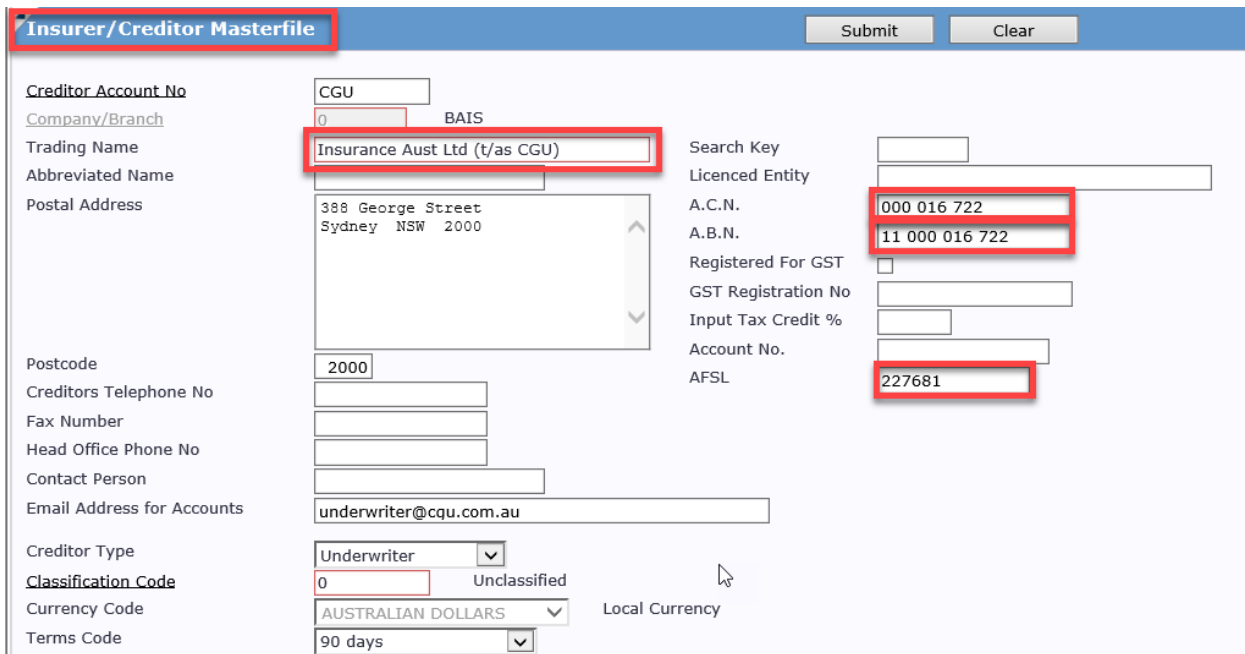
Available Forms and Reports

Type: Category: Sub Category:

Favorites

Type	Category	Sub Category	Form/Report (Click to Run)
Accounting	Maintenance		Insurer/Creditor Maintenance

Below is an example of the Insurer/Creditor Maintenance screen highlighting the details that need to be amended. Details below are the NEW details effective 1st August:



Insurer/Creditor Masterfile [Submit] [Clear]

Creditor Account No: CGU

Company/Branch: 0 BAIS

Trading Name: Insurance Aust Ltd (t/as CGU)

Abbreviated Name: [Empty]

Postal Address: 388 George Street
Sydney NSW 2000

Postcode: 2000

Creditors Telephone No: [Empty]

Fax Number: [Empty]

Head Office Phone No: [Empty]

Contact Person: [Empty]

Email Address for Accounts: underwriter@cqu.com.au

Creditor Type: Underwriter

Classification Code: 0 (Unclassified)

Currency Code: AUSTRALIAN DOLLARS

Terms Code: 90 days

Search Key: [Empty]

Licensed Entity: [Empty]

A.C.N.: 000 016 722

A.B.N.: 11 000 016 722

Registered For GST:

GST Registration No: [Empty]

Input Tax Credit %: [Empty]

Account No.: [Empty]

AFSL: 227681

Following is an extract from the original communication about this change that we received from CGU. This explains in greater detail what is changing and the allowed options for use of the new names, should you want to vary from the above recommended approach.

Extract from Communication from CGU

Background:

IAG are making some governance changes to streamline our business in an endeavour to continually improve the way we serve our customers.

The main change involves the transfer of several underwriting licences to a single licenced entity and one of the transferring entities is CGU Insurance Limited.

When will this happen?

The change will take place on **1 August 2017**. Our company entity name will change to “Insurance Australia Limited”, and we are currently updating our documents to reflect this from 1 August 2017.

Our Insurance offering will remain as CGU Insurance

How does this impact you?

Outside of a minor administrative change on your broker management system to update insurer details, the transfer will have no impact on you or your customers who hold policies with CGU. The terms of their policies will not change, other than that Insurance Australia Limited will become the insurer under each transferring policy.

The basis for these transactions are:

Effective 1/8/17 (and not before) the following updates are required to Broker Management Systems and the correspondence produced by them:			
If the following appears:	And...	From 1/8/17, it must display:	Comments
Any reference to the following entity, as the brand or business offering the cover: <ul style="list-style-type: none"> • “CGU Insurance Limited”, • “CGU Insurance Ltd” • Or any variant of the entity name - e.g CGU Ins Ltd • CGU Insurance • Or any variant of the brand – e.g. CGU 	The intention is to indicate the <u>brand or business</u> providing the insurance cover	CGU Insurance or CGU	CGU Insurance will continue to be the trading name offering the insurance cover; However, from 1/8/17 it will be underwritten by Insurance Australia Limited
	The intention is to indicate the <u>underwriter</u> of the insurance product or the <u>legal entity</u>	Insurance Australia Ltd	Insurance Australia Limited will be the underwriter of CGU branded insurance from 1/8/17. Pending character constraints, an acceptable option is: “Insurance Aust Ltd (t/as CGU)”
ABN 27 004 478 371 (or any format variant of the ABN, e.g. 27004478371)	n/a	ABN 11 000 016 722	
ACN 004 478 371 (or any format variant of the ACN, e.g. 004478371)	n/a	ACN 000 016 722	
AFSL 238291 (or any format variant of the AFSL, e.g. 238 291)	n/a	AFSL 227681	

Correspondence for the underwriter change can be directed to: **CGU eBusiness Team**

Tel: 1300 573 106

Email: edi.support@cgu.com.au