

## Navigate Customer Information Sheet 05

### Out of Scope MID Data Submission Type – Compare and Amend (C+A)

#### Introduction

MIB is re-platforming our MID and MIAFTR services onto a new, single, cloud-based platform. Navigate will be the new home for MID and MIAFTR data and insight.

A small number of Policyholders are using technology which will **not** be supported in the new platform. One of these methods is C+A, a process used via a single user ID to submit the entire vehicle details of a fleet to the MID

#### 1 What is changing and how do I move to a new process?

During the migration process, the user's policy and vehicle records will be migrated to the Navigate platform. Users submitting via C+A will no longer be able to do so on the new Navigate platform. Users will need to move to a different method of updating their vehicles.

The options are:

1. Standard File Format (SFF) submissions via the Navigate portal
2. Individual vehicle updates via the Navigate portal - for low volume vehicle changes.

#### Option 1 – SFF submissions via the Navigate portal

With C+A the user submits a file that contains details of the entire fleet, the C+A process compares the difference to the previously submitted file and makes the required changes.

The SFF format requires the user to submit **changes** to the fleet, users cannot send the entire fleet details.

A policy being updated by SFF is not 'locked' to a single user ID, thus any user authorised by the insurer can have access to the policy to submit a file.

The user will need to download the Navigate SFF Excel template from the 'Update Vehicle' page on the Navigate portal. The template has macros to validate data being entered to ensure it is the correct format for submission purposes.

A section at the end of this document covers each field in the template and advises on the population of the fields. The user will then upload the file manually via the Navigate portal.

To identify vehicle changes in the fleet a user could download a vehicle schedule from the Navigate portal and compare this to a list of their current vehicles.

### Submitting the first SFF file in the Navigate portal

The first SFF file the user submits must be records for ***any changes made to the fleet since the last C+A file was successfully processed on the MID.***

This will be a “**NEW**” type record for vehicles that are new or returning to the fleet, the latter being a VRM that is not currently on-cover. The on-cover date must be the date the vehicle is going on to the policy, the off-cover date can be the policy expiry date or the exact date the vehicle is leaving the fleet.

For vehicles that have left the fleet, the user will need to include an “**AMEND**” type record to take the vehicle(s) off cover. The “**AMEND**” record can be populated with an on-cover date that matches a record already on the policy, the off-cover date being the date the vehicle is leaving the fleet. Alternatively, the date the vehicle is leaving the fleet can be used to populate the on cover and off cover date of the amend record.

The amend record will update the existing record so the off-date equals the Amend record.

Only the off-date of the existing records are affected by this change; other changes in the truncating Amend (i.e., a change to the make/model) will not be applied to the existing records.

An amend record should also be used to extend the cover period of a vehicle on the policy if there is no gap in cover. If there is a gap in cover, the vehicle details should be submitted as a “**NEW**” type record.

### Option 2- Individual vehicle updates via Navigate portal

A user can Add and Update vehicle records via their Navigate portal account.

A Navigate Policyholder User Guide will be available soon.

## Populating the Navigate SFF template

This section explains the fields and values that are used to submit via SFF in the Navigate portal.

### **Record Type**

This field is mandatory, if a value is not entered the validation will prevent you saving and uploading the file.

This field should always be populated with a “V” for vehicle record. This is found on the drop-down menu which appears when you click into the Record Type field. You may also type the letter “V” into the field.

If you are entering multiple records, you may “drag” the “V” down to fill the requisite number of fields, rather than filling each field individually.

If you type another letter into this field, an immediate message will tell you the entry is not valid (see below). When you click Cancel or Retry, the entry will automatically revert to V (the only valid type).

### **Update Type**

A drop-down menu gives four options when you click on the arrow in the box: N, A, D and O.

When a record is being sent for the first time, the type will be New, and you should select “N”

When the details of a record have changed (e.g., you have extended the off-date at renewal, or the vehicle is being removed from cover) the record type is “Amend” select “A”

If the vehicle record was added in error and should be removed from the policy completely you should Delete the record, by selecting “D” and setting both the on-date and off-date to equal the very first On-date of the vehicle to be deleted. If you are replacing the record with a corrected version, you must remember to use the update type “N” after you have deleted the previous version.

If there are several versions of a vehicle record you can remove those with a specific on- and off-date by using “O-Delete” select “O”

If you type another letter into this field, an immediate message will tell you the entry is not valid. If you click Cancel, the template will clear the field. If you click retry you can overwrite the original entry.

### **Insurer ID**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

The Insurer ID will be provided to you by your insurer. It will always be a three-digit number. If the number is less than 100, you must populate the unused characters with a zero, i.e., 004. If you do not key three digits into the field, the validation in the template will prevent the record being saved.

If you have used the wrong ID for your policy, the record will be rejected when it is processed.

### **Insurer/DA Branch ID**

If your policy is administered by a particular branch, the insurer may ask you to complete one of the optional fields with a numerical code which they will provide. This field is not validated by the template, but if you complete it incorrectly, the record will be rejected.

### **Quote back**

This field is optional and can be used for free text up to 35 characters. If you complete it the entry will be used in any error files returned to you. You can use this to help identify the source of data, for example, i.e., DATA FROM BRADFORD OFFICE. This field is not validated.

### **Delegated Authority**

The Delegated Authority ID (if applicable) will be provided to you by your insurer. It will always be a three-digit number. If the number is less than 100, you must populate the unused characters with a zero, i.e., 004. If you do not key three digits into the field, the validation in the template will prevent the record being saved.

If you have used the wrong ID for your policy, the record will be rejected when it is processed.

### **DA Branch ID**

If your policy is administered by a particular DA branch, the insurer may ask you to complete one of the optional fields with a numerical code which they will provide. This field is not validated by the template, but if you complete it incorrectly, the record will be rejected when it is processed.

### **Policy Number**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

The policy number must be entered exactly as the insurer has notified it to you. If it does not match the number on the policy assigned to you the record will be rejected when it is processed.

The policy number must be completed in every line (i.e., for every record), even if they are all identical. If you are creating multiple records for the same policy, you can copy and paste the number into all the records to be completed. You should not “drag” the number into the rows, since this is likely to increment the number each time, and lead to rejection.

### **Foreign Registration Indicator**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

Policyholders should NOT submit details of foreign vehicles. The entry for this field will always be “U” which can be selected from the dropdown menu in the field. The entry can be “dragged” or copied into multiple rows if required. If the record is set to F the record will be rejected when it is processed.

If you type another letter into this field, an immediate message will tell you the entry is not valid.

### **Vehicle Registration Mark (VRM)**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file. There is no validation of the VRM or its format within the template.

However, if the VRM is incorrectly formatted the record will be rejected when it is processed.

### **Trade Plate Indicator**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

If the number in VRM relates to a trade plate you should populate the field with a T from the dropdown menu. If it is not a trade plate, you should select U. The VRM is validated whether you select “U” or “T”

If you type another letter into this field, an immediate message will tell you the entry is not valid.

### **Vehicle type/make/model /vehicle derivative/vehicle engine size/number of seats/ gross vehicle weight.**

These are all optional fields, please complete these fields as accurately as possible as this information will be displayed exactly as entered.

Alternatively, you may use a Vehicle Code, which will be translated into vehicle make and model.

### **Vehicle On-date**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

The dates can be populated in the 'normal' format, the template will automatically convert the date to the acceptable format of CCYYMMDD (i.e., 15 May 2023 is 20230515).

### **Vehicle Off-date**

This field is mandatory. If you do not complete it, the validation will prevent you saving the file.

The off-date conversion works in the same way as the on-date.

The off-date must be later than the on-date, and if this is not entered correctly, then the validation will highlight this. It will not be possible to save the template until this has been corrected.

### **Permitted drivers/class of use/additional drivers' indicator etc.**

The remaining fields are shown in orange to highlight the fact that they should not be completed by policyholders. Any data entered in these fields by policyholders will not be applied to the MID (but the record will not be rejected).

Please note however, that the record is a fixed length, and these cells must not be deleted. If you delete the columns, the file will be rejected.

A complete Navigate Policyholder user guide will be available soon.

### **Next steps**

Discuss the options explained in this document to decide which method you wish to use and ensure any required changes are in place by Navigate Go Live on November 6.

More information can be found on our programme [microsite](#).