

NAVIGATE



Motor Insurance Policy Data Insurer/DA user guide

**For Insurer and Delegated Authority users of Motor
Insurance Policy Data application on Navigate**



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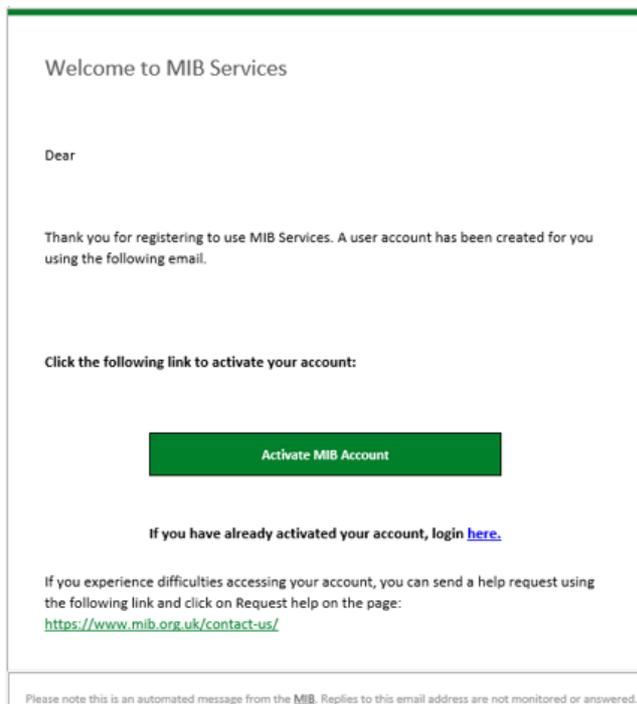
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1 Accessing the Navigate portal

You'll have access to log onto the Navigate portal via [Navigate](https://identity.mib.org.uk/user/login) (<https://identity.mib.org.uk/user/login>) once you've been set up.

Your organisation must whitelist the following email: noreply@identity.mib.org.uk to ensure you receive the emails to set up your Navigate account.

You'll receive this activation email, click on **Activate MIB Account** in that welcome email.



This will open in your browser.

Click **Activate Account**.



Activate your account

Thank you for registering to use MIB's Services. Please click on the Activate Account button to start setting up your account.

[Activate Account](#)

Your **username** is your email address;

You'll need to set a **password** and answer a **security question**.

It's important you remember the answer to your security question as you'll be asked to provide this in future.



Create a password for your account

Create a password so you can login to your account.

Password must have

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol (! # \$ % & ' () * + , - . / : ; < = > ? @ [] ^ _ ` { } ~ -)
- Not contain either your name or your last name
- Not to be one of your previous 4 passwords

Enter password *

Show Password

Confirm password *

Show Password

Choose a memorable question and answer so you can login to your account if you forget your password.

Select a security question *

Security answer *

Continue

You'll then be automatically enrolled in a **2-Factor Authentication (2FA)** using your email address.

You'll **receive an email with a 6-digit code** to verify your account.

If you tick **Remember this code for 28 days**, you can log in using your password without 2FA for the next 28 days on the same device. After that you'll have to verify 2FA again.



Verify your account with 2FA

To maintain the security of your account you have autoatically been enrolled in 2 Factor Authentication and we have sent you an email with a 6 digit code. Please enter the code in the box below and click verify.

Enter 6 digit code *



Remember this code for 28 days

Verify

Exit

Once you've clicked **Verify**, you can either set up the 2FA with a mobile phone number or, continue to the Navigate portal by selecting **Continue to my applications**.



[My Apps](#)

[Profile](#)

[My Factors](#)

[Logout](#)

Factors available to you.

You have successfully enrolled in factor type **email**

[Enroll in factor type sms](#)

Continue to my applications

1.1 Using a mobile phone for 2FA

To set up 2FA using a mobile number, you need to select the country code and enter your number. When you click **Send Code** you'll receive a text message containing the 6-digit code for the authentication.

Register for 2-step authentication

To secure your account, you need to provide your mobile phone number. If you don't have your mobile phone with you, you can select Exit and sign in again later with your email and password to continue with the process.

Please, provide your phone number and click send code. You will receive a verification (SMS) with a 6 digit code that you will need to introduce in the next screen to access the MIB Identity Portal

Country code *

Mobile number *

Send code

Exit

Once you're verified, you'll be redirected to the **Sign in** page again.

Sign in

For further details on the Navigate programme and service status please visit our [Navigate home page](#).

Email *

Password *

Show password

[Forgotten your password?](#)

[Unlock your account](#)

Remember me?

Sign in

You'll then be given the option of **email or mobile phone** for authentication.



2-step authentication

You have multiple factors configured, please select the factor you would like to use to verify your account.

[Send a code to me via email](#)

[Send a code to me via sms](#)

Once activated and registered, use the following URL: <https://navigate.mib.org.uk> and enter your email address and password, then click "Sign in":



Sign in

Email *

Password *

Show Password

Remember me?

Sign in

Register here

- [Navigate](#)
- [MIB Claims - Direct claimant](#)
- [MIB Claims - Claimant representative](#)

Need help signing in?

- [Forgot your password?](#)
- [Unlock account?](#)
- [Help and information?](#)

You'll be required to accept the Terms & Conditions. To do this, scroll through the document in the box which will show the tick boxes and 'Accept' and 'Decline' buttons:

Terms & Conditions

Before you continue, please read and accept the Terms and Conditions. To understand how we process personal data, information can be found in our [privacy notice](#).

1 Terms of Use

Please read these Terms of Use carefully and make sure you understand them before using this website as they (together with the documents referred to in them) apply directly to your use of this website www.example.com (the "Website") and tell you the legal terms of use on which you may make use of this Website.

By accessing this Website, you agree to be bound by all of the following Terms of Use.

- I declare that I understand it is a criminal offence to wrongfully obtain personal data via this portal and that I must only use personal data in compliance with UK GDPR.
- I agree to these terms and conditions which will bind you and, where applicable, your employees. These terms include, in particular, limitations on liability in clause 15 (MIB's Limitation of Liability)

Accept

Decline

 [Download PDF](#)

1.2 Forgot/change password

If you've forgotten your log in details, locate the 'Need help signing in?' section on the Navigate log in home page. Here you'll be able to select forgot password, unlock account or if you require further help and information.



Sign in

Email *

Password *

Show Password

Remember me?

Sign in

Register here

- [Navigate](#)
- [MIB Claims - Direct claimant](#)
- [MIB Claims - Claimant representative](#)

Need help signing in?

- [Forgot your password?](#)
- [Unlock account?](#)
- [Help and information?](#)

You'll be asked to provide your email address which was used when your account was set up. Follow the link in your email:



To:

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.

Dear Tess,

You have requested a password reset for your MIB account

[Reset Password](#)

This link expires in 1 hour.

If you experience difficulties accessing your account, you can send a help request on your sign-in page or contact us using the link: <https://www.mib.org.uk/contact-us/>

Please note this is an automated message from the [Motor Insurers Bureau](#). Replies to this email address are not monitored or answered.

Then answer your security question you provided when you registered.



Answer Forgotten Password Challenge

What was your first car?

Show

[Reset Password](#)

[Back to sign in](#)

1.3 Locked out

If you don't use your account within 90 days, your account will become locked. After 180 days, your account will be deleted.

If you've been locked, or suspended from using the portal, you'll be notified to that affect. If you are inactive, the Organisation Administrators will be able to unlock your account.



Account locked

Account locked

2 Navigate Portal Help

Navigate ways to help you built into its design.

The Help Centre, is located on the bottom right-hand side of the page.

It consists of:

Contact Support will ask you to enter your details, if not already populated and allows you to submit a general request for help and a brief description of your issue. A response will be provided by the Navigate support team.

Contact Support [Close]

Your Name*

Email*

Organisation*

Phone No*

Area of Issue* Select Option ▼

Brief Description* 0/500

- Search Query
- Account Query
- Account Amendment
- System Error/Issue
- Technical Issue/Query
- Reporting Query
- Testing Query
- Other Query

The Help Centre also gives you access to a Frequently Asked Questions page including useful information and guides.

Tooltip icons (see below) usually found on titles/headings offer help relating to the page or item you're looking at.

Policy No. 00000000002

Below the Vehicle Registration it will tell you how many unique VRMs/Vehicles are on this policy e.g. "This Policy currently covers xx vehicle's"

*Reminder: Some vehicles may have more than one record.

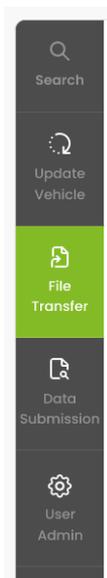
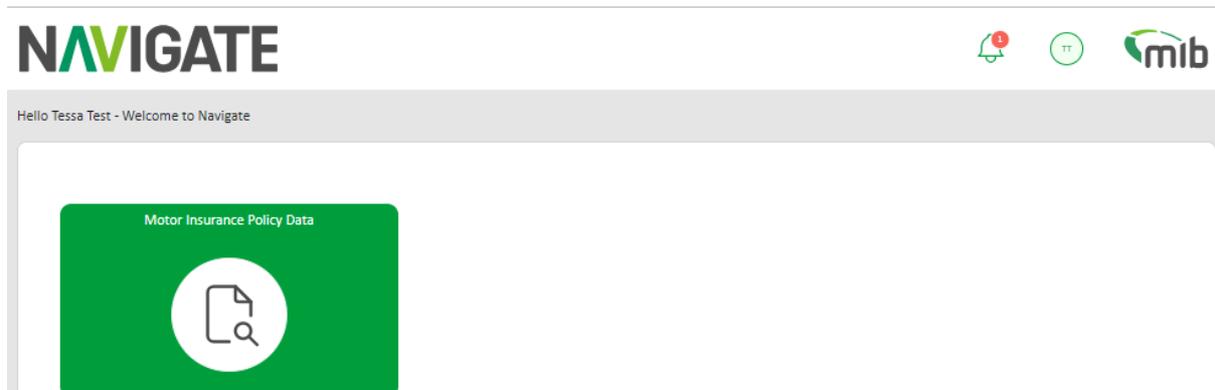
You'll also be provided with a notification bell, where useful updates will be sent to keep you informed about updates, changes or issues.

Notifications [1] [View All](#)

- test state1: test Today
- ABC: DEF 20/02/2024
- testkd: tstkd 16/02/2024

3 Logging in

After selecting 'Log in' and once you've accepted the terms and conditions, you'll need to click on the Motor Insurance Policy Data tile.



On the left-hand side of the page, there'll be tiles associated to different functions. The role assigned to your account will display the associated tiles. All functions are referred to in this **Guide**.

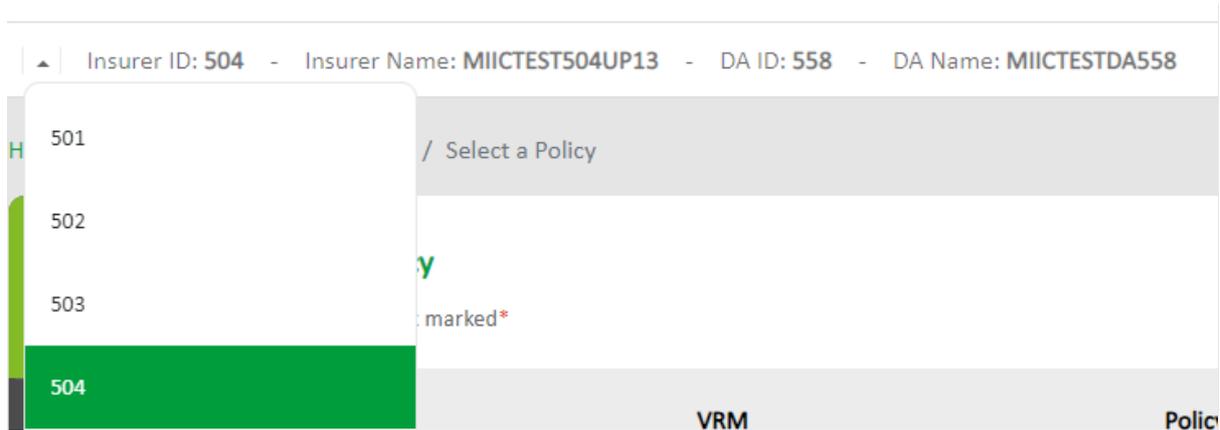
4 Insurer/DA Toggle options

4.1 Select a different Insurer (for DA users only)

If it's applicable to you, on the User Admin, Update Vehicle and/or File Transfer screens, an alternative insurer can be selected. This enables:

- A Delegated Authority user, who has access to manage users and update vehicle details for multiple insurers, to access information for a specific insurer **without** the need to log out and log in again

Use the 'drop down' arrow next to the Insurer ID to select the respective insurer from the available list; the page will be refreshed with data for the insurer chosen. The selection will carry over to other screens where applicable.



4.2 Selecting a different DA (for Insurer users only)

If it is applicable to you, on the User Admin and/or Update Vehicle, a DA code can be selected. This enables:

- A user, who works for an Insurer who has authorised DAs to submit data to the Navigate Database on their behalf, to access information for a specific DA. All DAs that are authorised to submit for the Insurer are available for selection

Use the 'drop down' arrow next to the DA ID to select the respective DA from the available list; the page will be refreshed with data for the DA chosen.



The selection will carry over to other screens where applicable. Switching to Search, Data Submissions or File Transfer tabs will revert to the users own Insurer ID. If you switch to User Admin or Update Vehicle, the DA ID selected will be active/visible once more.

If you no longer want a DA selected in the drop-down field, select the DA ID again and they will be unselected. You'll also not be able to use the drop down once you've clicked through to secondary pages.

Search

Making enquiries on records



5 Using Search

The Search function enables authorised users to search Navigate for policy and vehicle information on a given date. You'll see full details of policies submitted by their organisation, but only claims contact information for a third-party insurer.

5.1 Search for a policy

Enter the vehicle registration and the date, using the calendar widget and select the "Search" button.

Search Policy

Insurer/DA users may view their own policies for any purpose. Third party data may only be viewed for permitted purposes. If unsure, check these purposes with your Organisation Administrator.

VRM* **Select Date*** 

POLICY DETAILS

Policy Type	FLEET	Policyholder Name	Mr Halwet
Policy Number	YGPC0018634	Policyholder Address	1 Test Lane, Test Park, , , London, TT1 1TT
Enquiry Date	18/03/2024	Policyholder Contact	Not Supplied
Policy Effective Date	01/01/2024		
Policy Expiry Date	31/12/2024		

NAMED DRIVER DETAILS

No Named Drivers on Policy

VEHICLE DETAILS

VRM	G170GW	Trade Plate	U	Vehicle Type	CAR
Vehicle Make/Model & Derivative	FORD FIESTA	Gross Weight		Number Of Seats	
On Cover Date	10/01/2024			Engine Size (cc)	
Off Cover Date	10/10/2024				
Class of Use	S, D AND P 1				
Permitted Drivers	new edit				

INSURER DETAILS

Insurer Name	ADAVARA
Insurer Claims Contact Details	Testing1
Delegated Authority ID	

The response displayed will be one of the following:

1. No policy found – a message bar will display below the search fields
2. One policy for your organisation – full policy details will be displayed
3. One policy for a third-party insurer - third-party details will be displayed

- Multiple matches – third-party details will be displayed. For your own organisation’s policies, select on a chosen policy row to display full details.

It’s not possible to display more than 10 records and a message will be shown to this effect.

Click on the row you wish to expand if more than one record appears for the vehicle.

SEARCH RESULTS

2 matching records found

Policy Number	Insurer Name	Insurer Claim Contact Details
000000000002	ADAVARA	Testing1
000000000001	ADAVARA	Testing1

POLICY DETAILS

Policy Type	FLEET	Policyholder Name	Test Commercial
Policy Number	000000000002	Policyholder Address	Test house, Test Lane, London W4 1BS, W4 1BS
Enquiry Date	01/04/2018	Policyholder Contact	test.test@mailinator.com
Policy Effective Date	01/04/2018		
Policy Expiry Date	01/04/2099		

NAMED DRIVER DETAILS

No Named Drivers on Policy

VEHICLE DETAILS

VRM	ABC789	Trade Plate	U	Vehicle Type	CAR
Vehicle Make/Model & Derivative	TEST TEST	Gross Weight	00000	Number Of Seats	0
On Cover Date	26/04/2018			Engine Size (cc)	0
Off Cover Date	27/01/2099				
Class of Use					
Permitted Drivers					

INSURER DETAILS

Insurer Name	ADAVARA
Insurer Claims Contact Details	Testing1
Delegated Authority ID	

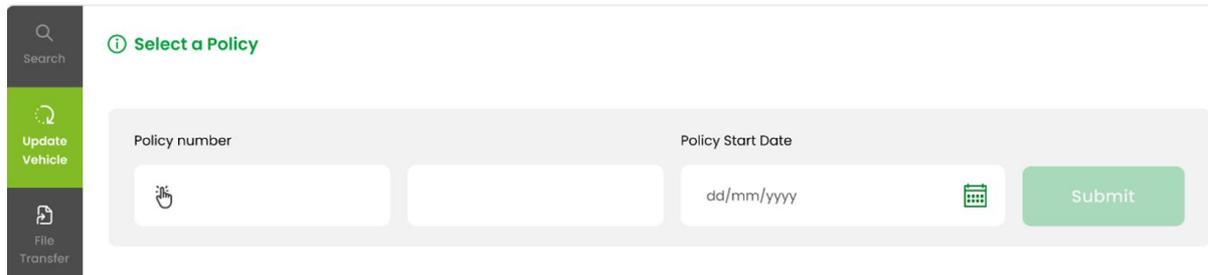
Update Vehicle

Add and update vehicle records on fleet and commercial policies



6 Using Update Vehicle

Select Update Vehicle from the menu bar.

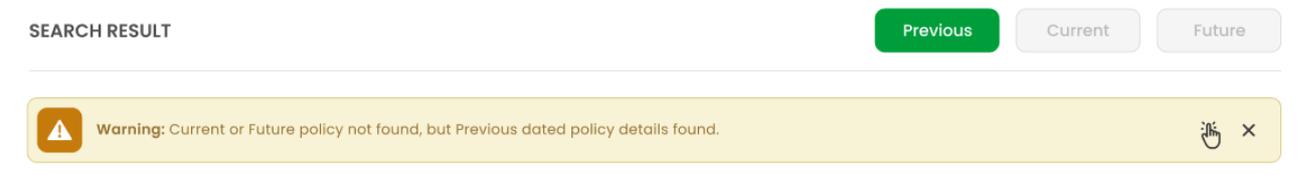


The screenshot shows a web interface with a sidebar on the left containing three menu items: 'Search', 'Update Vehicle' (highlighted in green), and 'File Transfer'. The main content area is titled 'Select a Policy' and contains a form with two input fields: 'Policy number' and 'Policy Start Date'. The 'Policy Start Date' field includes a calendar icon and a 'Submit' button.

6.1 Selecting a policy

Search for a policy using a complete and accurate Policy Number and or a Vehicle Registration Mark, you can also use a policy start date in addition.

The current version of the policy will be displayed first. If there is no current version but there is a future version, this will be displayed first, otherwise the previous version will be displayed. An example message below will be displayed if there is only a future or previous version.



The screenshot displays a search result interface. At the top left is the text 'SEARCH RESULT'. To the right are three buttons: 'Previous' (highlighted in green), 'Current', and 'Future'. Below these buttons is a yellow warning banner with a warning icon and the text: 'Warning: Current or Future policy not found, but Previous dated policy details found.' A close icon is visible on the right side of the banner.

Click the relevant version if available, to move between Previous, Current and Future policies.

6.2 Viewing vehicle records

When a policy is selected, the page will display all the vehicle records on the policy. All fields in the table have a filter icon which allow the user to sort up or down when clicked. You can view just the vehicles that are "On Cover Only", "Previously On Cover" and "Due On Cover" by using the appropriate filter.

If a vehicle has been on cover on more than one occasion during the life of the policy, a list of the records will be presented. Each entry will show the on date and off date, so that the correct record can be selected and then updated.

Please Note: The vehicle table displayed for a current version of the policy will also include all vehicles due on cover. Use the check box filters to view vehicles with a different cover status.

Search Result

Previous **Current** Future

Policy No. YGPC0018634

Select a different Policy

Policy Status : Current | Policy Start Date : 01/01/2024 | Policy End Date : 31/12/2024

Policy Details

Policy Type	FLEET/COMMERCIAL	Policyholder Name	Mr Halwet
Last Accessed Date	18/01/2024	Policyholder Address	1 Test Lane, Test Park, London, TT1 1TT
Class Of Use	S, D AND P 1	Policyholder Contact	
Permitted Drivers	0		
Named Drivers	Named driver not found		

Vehicle Registration: **Search** **Add Vehicle** **View/Update** **Remove vehicle added in error** **Download Vehicle Schedule**

This policy currently covers 4 vehicle(s)

Show all vehicles On Cover only Previously On Cover only Due On Cover only

VRM	On Date	Off Date	Type	Make	Model	CC	Cover Status
AA02AAA	10/01/2024	30/07/2024	CAR	Hyundai	FORD	1400	PREV ON
AA02AAA	10/01/2024	30/07/2024	CAR	Hyundai	FORD	1400	ON COVER
cg10fft	18/01/2024	31/12/2024	CAR	mercedes	c class	0	ON COVER
Newda01	18/01/2024	31/12/2024	COMMER...	mercedes	c class	0	ON COVER

Displaying Results 1 To 4 of 4

< 1 >

Show: 10 Rows

6.3 Adding a vehicle to a fleet/commercial policy

Select the policy you need to add the vehicle to, then select "Add Vehicle". This will open a new page, as shown below, with fields that can be edited/completed with the relevant information. Enter the details, select the "Submit" button, and the vehicle will be added.

You must provide a vehicle registration, an on-cover date, and an off-cover date.

The registration will be checked against a third-party database, and if Make/Model details are found, these will appear automatically. If the details are not found, a message will appear, you should then enter the vehicle details manually.

 The VRM FGH765 entered does not have corresponding vehicle make/model details in the database. Please populate the fields manually. 

If the registration is a Trade Plate, select the Trade Plate from the drop-down menu in vehicle details.

It's recommended that the other fields are completed where possible:

- Vehicle Type (e.g. car, motorcycle)
- Vehicle Make (e.g. Ford, Hyundai)
- Vehicle Model (e.g. Astra, i30)
- Vehicle Derivative (e.g. GLS)
- Vehicle Engine Size in cc (e.g. 1400)
- Number of Seats (for buses and minibuses)
- Gross Vehicle Weight (for HGVs)

VEHICLE DETAILS		DRIVER DETAILS
Vehicle Type <input type="text" value="Select Option"/>	Vehicle Make <input type="text"/>	Class of Use <input type="text"/>
Vehicle Model <input type="text"/>	Derivative <input type="text"/>	Permitted Drivers <input type="text"/>
Engine Size <input type="text"/>	Number of Seats <input type="text"/>	Named Driver 1 : <input type="text"/> <input type="checkbox"/> Exclude
Gross Vehicle Weight <input type="text"/>		Named Driver 2 : <input type="text"/> <input type="checkbox"/> Exclude
		Named Driver 3 : <input type="text"/> <input type="checkbox"/> Exclude
		Named Driver 4 : <input type="text"/> <input type="checkbox"/> Exclude
		Named Driver 5 : <input type="text"/> <input type="checkbox"/> Exclude
		Named Driver 6 : <input type="text"/> <input type="checkbox"/> Exclude

After completing all the details, select "Submit" and the vehicle will be added.

6.4 Updating Vehicle details

Select the vehicle you want to update from the list displayed in "Update Vehicle" screen, if the vehicle record you want to update is not visible on the screen, you can find the vehicle by:

- Entering the complete registration or first few characters in the "Vehicle Registration" box and select "Search"

- Scrolling through the list of vehicles visible on the screen using the scroll bar on right hand side of table
- Paging through the list of vehicles using the page navigation buttons at the bottom of the screen

Then, select the vehicle row by hovering on it so it is highlighted in green, then select “View/Update” button.

Vehicle Registration:

Update Vehicle

Policy No : 000000000002

Previous Policy Start Date :	Previous Policy Expiry Date :
Current Policy Start Date : 01/04/2018	Current Policy Expiry Date : 01/04/2099
Future Policy Start Date :	Future Policy Expiry Date :

Vehicle Registration * <input type="text" value="BB1ZEPH"/>	Vehicle On Cover Date * <input type="text" value="22/01/2024"/> <input type="button" value="Calendar"/>
Trade Plate <input type="checkbox"/>	Vehicle Off Cover Date * <input type="text" value="22/10/2024"/> <input type="button" value="Calendar"/>

This Vehicle is currently ON COVER
✕

VEHICLE DETAILS	DRIVER DETAILS
Vehicle Type: <input type="text" value="CAR"/>	Class of Use: <input type="text"/>
Vehicle Make: <input type="text" value="NISSAN"/>	Permitted Drivers: <input type="text"/>
Vehicle Model: <input type="text" value="MICRA"/>	Named Driver 1: <input type="text"/> <input type="checkbox"/> Exclude
Vehicle Engine Size: <input type="text"/>	Named Driver 2: <input type="text"/> <input type="checkbox"/> Exclude
Gross Vehicle Weight: <input type="text"/>	Named Driver 3: <input type="text"/> <input type="checkbox"/> Exclude
Number of Seats: <input type="text"/>	Named Driver 4: <input type="text"/> <input type="checkbox"/> Exclude
	Named Driver 5: <input type="text"/> <input type="checkbox"/> Exclude
	Named Driver 6: <input type="text"/> <input type="checkbox"/> Exclude

To remove a vehicle from cover, change the vehicle off-cover date.

Vehicle Registration * Vehicle On Cover Date * 18/11/2015

Trade Plate Vehicle Off Cover Date * 18/11/2015

Select “Submit” when completed.

Please note, when taking a vehicle off cover please do not amend any other details on the record other than the off-cover date, as it will create a duplicate record on the database. Should you want to change other details i.e., a change to permitted driver code for the vehicle you should change the off date in the record. Then add NEW vehicle record to policy with the updated details for the vehicle.

6.5 Remove a vehicle added in error

For vehicles that have come off-cover, see the ‘Updating vehicle details’ section. Select the policy you need to remove the vehicle from, then the vehicle and select “Remove vehicle added in error” button.

Vehicle Registration:

Selecting this will open a confirmation message asking if you’re sure you want to delete the record.

Remove vehicle added in error ✕

Are you sure you want to remove this vehicle? All records with this VRN will be deleted from this policy.

Select “Continue” and the vehicle along with any linked vehicle records where the details were amended, will be deleted from the policy.



Only use “Remove vehicle added in error” to delete a vehicle added in error.

If you wish to remove a vehicle from cover, then use the “View/Amend” button, and amend the vehicle off cover dates.

6.6 Download a Vehicle Schedule

On Update Vehicle tile, and you’ve selected a policy to review, there will be an option to select “Download Vehicle Schedule”.

The screenshot shows the 'Update Vehicle' interface. On the left is a sidebar with navigation options: Search, Update Vehicle, File Transfer, Data Submission, and User Admin. The main content area is titled 'SEARCH RESULT' and displays policy information for 'Policy No. MIDPOUM2POL002A'. A green bar indicates 'Policy Status : CURRENT' with start and end dates. Below is a 'POLICY DETAILS' table with fields for Policy Type, Last Accessed Date, Policy Holder Name, and Policy Holder Address. A control bar contains buttons for Search, Add Vehicle, View/Update, Remove vehicle added in error, and Download Vehicle Schedule (highlighted with a red box). Below the buttons, there are filter options for vehicle status. A table lists covered vehicles with columns for VRM, On Date, Off Date, Type, Make, Model, CC, and Cover Status.

VRM #	On Date #	Off Date #	Type #	Make #	Model	CC #	Cover Status #
AJ	29/07/2016	22/03/2017	CAR	MERCEDES	CLS5 AM3 AUTO	0000	ON
FT67109	17/05/2016	22/03/2017	CAR	MERCEDES		0000	ON

This option will display a pop-up box which will allow a request for a vehicle schedule.

Download a Vehicle Schedule ✕

Request download for:

Current Policy Period

Today's Schedule

Dates Between

and

Cancel
Download

After selecting “Download” you’ll get the option to open and/or save the file which is named in the format: “RSDownloadYYYY-MM-DD.csv”.

This download is in the following format which includes headers for columns:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Policy Number	Policyholder Name	Vehicle Registration Number	Trade Plate Indicator	Vehicle Type	Vehicle Make	Vehicle M	Vehicle De	Vehicle En	Number of Gross Vehi	Vehicle Co	Vehicle Or	Vehicle Of	Last Amen	User Prefix	User Name	Amended	
2	000000000002	Test Commercial	001test	U									20180401	20240401	20240219		Helpdesk:I	
3			002test	U	COMMERCIAL VEH/VAN	Mahindra	Jeep	123	1344	2	3233	00000000	20240205	20250401	20240205		Vehcleup:I	
4			002test	U	COMMERCIAL VEH/VAN	MahindraUpdate	JeepUpdat	123	1344	2	3233	00000000	20240205	20250401	20240205		Vehcleup:I	
5			003Test	U	CAR	Maha	4X4	12	1234	12	1200		20240205	20250131	20240219		Helpdesk:I	
6			003Test	U	CAR	MahaUpdate	4X4UP	12	1234	12	1200		20240205	20250131	20240205		Vehcleup:I	
7			003Test	U	CAR	MahaUpdate	4X4UP	12	1234	12	1200		20240205	20250131	20240219		Helpdesk:I	
8			004test	U		BENTLEY	wage	11	12	1	2000		20240205	20250401	20240219		Helpdesk:I	
9			004test	U		BENTLEYnew	wagenew	11	12	1	2000		20240205	20250401	20240219		Helpdesk:I	
10			004test	U	COMMERCIAL VEH/VAN	BENTLEY	wage	11	12	1	2000		20240205	20250401	20240205		Helpdesk:I	
11			004test	U	COMMERCIAL VEH/VAN	BENTLEYnew	wagenew	11	12	1	2000		20240205	20250401	20240219		Helpdesk:I	
12			00test1	U	COMMERCIAL VEH/VAN	Hyundai	Astra	12	322	3	2000		20240201	20250401	20240201		Vupd_Help:I	
13			00test1	U	COMMERCIAL VEH/VAN	HyundaiUPd	AstraUPD	12	322	3	2000		20240201	20250401	20240201		Vupd_Help:I	
14			01Test	U	CAR	Maha	4X4	12	1234		1212		20240205	20240401	20240205		Helpdesk:I	

The file can be filtered by On Date and Off Date to view vehicles that are no longer on cover, currently on cover and due on cover.

The downloaded vehicle schedule will show who last updated a vehicle record, or whether Navigate has updated this in the background, such as a renewal.

Amended by Insurer (I), Delegated Authority (D), Policyholder (P), System (S) or MIB (M).

Usually for S system updates you will see a username of P000000000, this will refer to your organisations SFTP account.

M updates will refer to either Historical Batch, which were updates performed prior the launch of Navigate. Or a username of autorenewal@mib.org.uk, this is showing you that a vehicle record was renewed along with the policy.

This CSV file can be printed if a copy of the schedule is required.

Managing Policyholders

Setting up and managing policyholder accounts for updating vehicles on fleet and commercial policies.



7 Maintain policyholder users

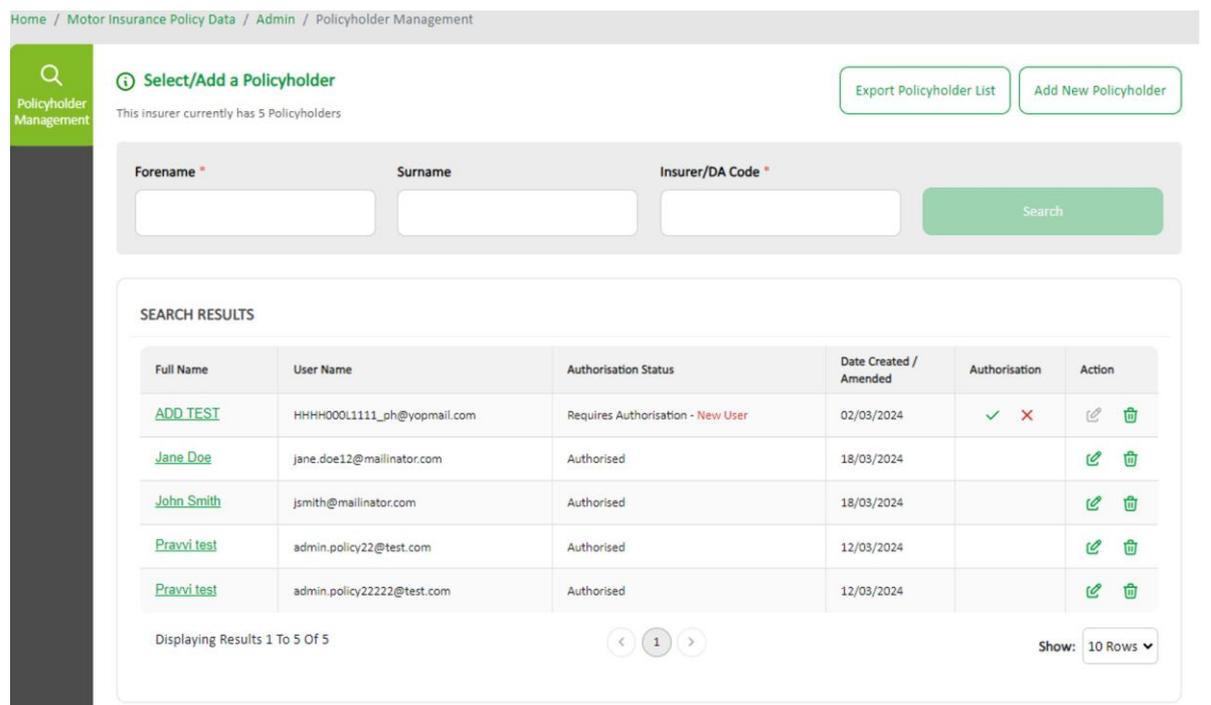
7.1 View policyholder users

To access policyholder maintenance, you must first have the required access, select the “User Admin” tile on the left-hand side of Navigate. You’ll then be presented with the Policyholder Management page. The role associated with this is Navigate Helpdesk L2 or L3, (L2 or L3).

The table shows the user’s full name, email, authorisation status, date created or amended, authorisation and edit/delete action for helpdesk users, for all of policyholder users. You can filter the list by user’s name and Insurer/DA Code, both must be entered for the search to work. Surname is not a mandatory field to search with, as policyholders may have an organisation name within the forename field.

To locate a specific policyholder, enter the Insurer ID (with or without the DA ID) e.g. 111 or 111888, in the Insurer/DA Code box then enter the exact user forename and surname in the user’s name boxes and select “Search”.

If the exact users name is not known, enter one or more letters and select “Search”, and any users that start with the same letter/s will be displayed.



The screenshot shows the 'Policyholder Management' page. At the top, there is a breadcrumb trail: Home / Motor Insurance Policy Data / Admin / Policyholder Management. Below this, a green sidebar contains a magnifying glass icon and the text 'Policyholder Management'. The main content area has a title 'Select/Add a Policyholder' and a sub-header 'This insurer currently has 5 Policyholders'. There are two buttons: 'Export Policyholder List' and 'Add New Policyholder'. Below these are three search input fields: 'Forename', 'Surname', and 'Insurer/DA Code', followed by a 'Search' button. The search results are displayed in a table with the following data:

Full Name	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
ADD TEST	HHHH000L1111_ph@yopmail.com	Requires Authorisation - New User	02/03/2024	✓ ✗	
Jane Doe	jane.doe12@mailinator.com	Authorised	18/03/2024		
John Smith	jsmith@mailinator.com	Authorised	18/03/2024		
Pravvi test	admin.policy22@test.com	Authorised	12/03/2024		
Pravvi test	admin.policy22222@test.com	Authorised	12/03/2024		

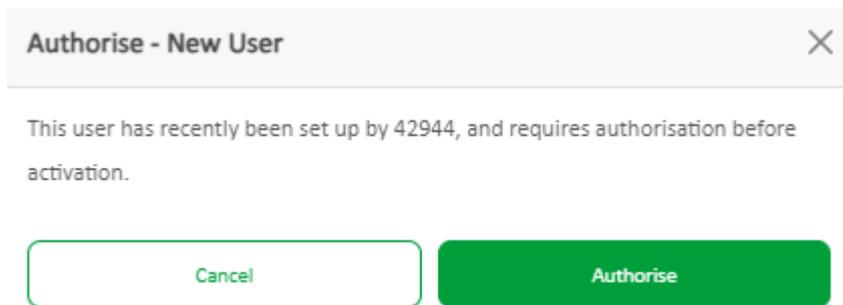
At the bottom of the table, it says 'Displaying Results 1 To 5 Of 5' and 'Show: 10 Rows'.

Authorise/Decline authorisation action

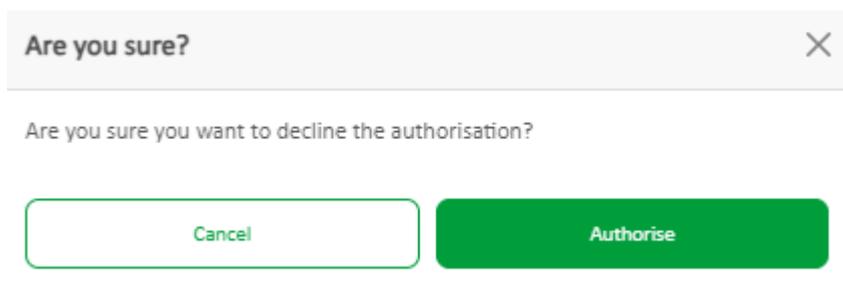
Within the policyholder search results, you’ll see an authorisation column (see below). To authorise the work of a L3 user, a L2 or a different L3 user can do this from this page.

Full Name ▼	User Name	Authorisation Status ▼	Date Created / Amended	Authorisation	Action
Hira Gargiya	a12111bc12@gmail.com	Requires Authorisation - New User	26/10/2023	✓ ✗	

You'll see either a tick or cross icon next to any action that requires authorisation. To authorise the request, the user should click on the tick icon, where a pop up will be presented to show the user the basic amendment details of the request.



If you choose to press the cross icon, a pop up will ask you if you're sure you want to decline the authorisation. This will decline the changes presented by a previous L3 user. The information will revert prior to the change. If the Policyholder was in a "New User" state, they will be deleted, as they have not been authorised fully on to Navigate.



If you wish to view more details, you can view these by clicking on the user's full name in the table to expand the Policyholders details.

L3 users cannot authorise their own work, this will disable authorisation and edit functions.

MICHAEL JOHN	san@mail.com	Requires Authorisation - Lock	03/11/2023	✓	✗		
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7.2 Action

Next to the relevant policyholders, you'll be able to see an action column, where you can quickly edit a policyholder, using the pen icon.

The pen will be greyed out if you're a L3 user and your action is waiting to be authorised, or if the user is in new user state.

The bin icon will allow you to delete a policyholder, a relevant pop up will be provided to notify you of the action. If you're an L3 user, the action will need to be authorised by a L2 or a different L3 user.

7.3 Add a new policyholder

To add a new policyholder while in the User Admin and Policyholder Management menu, select “Add New Policyholder” from the policyholder list page. This will open the policyholder creation page for completion.

The following fields are mandatory and must be entered:

- Forename and surname
- Email Address
- Policy Number or Access Code

The screenshot shows a web form titled "Add a new Policyholder". At the top left, there is a green information icon and the title. At the top right, there is a "Back to Policyholders" button. The form fields are as follows:

Insurer/DA Code ⓘ:	999		
User Type :	Policyholder-Vehicle Update Only	Forename :	<input type="text"/>
Insurer :	999	Surname :	<input type="text"/>
Insurer Branch:	<input type="text"/>	Email Address:	<input type="text"/>
DA :	<input type="text"/>	Policy Number :	<input type="text"/>
DA Branch :	<input type="text"/>	Access Code :	<input type="text"/>

At the bottom right of the form, there is a green "Submit" button.

As an L2 user, your actions are authorised automatically when pressing submit, however as an L3 user performing an action, they'll need to be authorised by a different L3 or L2 user when pressing submit.

Once authorised, the new policyholder should then automatically be sent an email by OKTA, the Navigate user management system.

The action of authorising L3's work is described in more detail in section 5.3.

Currently, you'll not be able to amend a user's email or name once they have been created. If the email entered has changed, delete this user and create a new record. If required, a support request can be made to amend the users name, select the 'Help-Contact support'.

Please note – when a policyholder already exists on Navigate, as they have been set up by another organisation, the name provided by their initial set up will be the name that will show on your policyholder's details once saved. Additionally, if a user has already been set up by your organisation using the same email address, you'll be notified by a popup.

Existing Email



This email is already linked to an existing user **XXXX**, locate the existing user if an amendment needs to be created, or delete this user and create a new account.

7.4 Review policyholder details

To review an existing policyholder, from the Policyholder Management tile, search for the user in the policyholder list, then select the hyperlinked user's name or click on the pen icon where it's enabled. The pen icon is another new addition under the "Action" column and will open the policyholder details page.

Full Name	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
ADD TEST	Gph1@mailinator.com	Authorised	05/01/2024		

You'll be able to lock/unlock the account, and you can also add, amend or remove policies, which is explained in section 5.7.

Once the changes have been made click "Submit". L2's work will be authorised automatically, and L3's work will need to be authorised by another user.

Edit Policyholder

Last Updated By: BAT INSHelpdesk	Authorised By: BAT INSHelpdesk	<input type="button" value="Submit"/>
Last Updated Date: 05/01/2024	Authorised Date: 05/01/2024	

Once a change has been submitted by a L3 and is pending authorisation, a user will not be able to amend the details until they have been approved or declined.

Insurer/DA Code: 996

User Type: Policyholder-Vehicle Update Only **Forename:** forename
Insurer: EXPERIAN TEST1 **Surname:** surname
Insurer Branch: **Email Address:** abc132@gmail.com
DA:
DA Branch:

Account Locked/Unlocked: No

forename surname has access to 1 policies Add Policy

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
000000000001	EXPERIAN TEST1				Authorised	25/08/2023		 

Displaying Results 1 to 1 of 1 < 1 > Show: 10 Rows

7.5 Delete a policyholder

From the Policyholder Management tile select “User Admin” then search for the user in the policyholder list and select the users name or the pen icon. This will open the policyholder details page and you can select “Delete Policyholder”.

You’ll then be presented with a prompt, select “Delete” to remove the policyholder.

If a L2 has performed this action the user will have been deleted, if a L3 user has performed this action, this will create a task which requires authorisation for that policyholder on the management home page, which the user will be taken to by default, the action will have a “Requires Authorisation – Delete User” status.

Delete User ✕

Are you sure you want to delete this user? By confirming to this action, the user will no longer have access to the policies assigned to them with this Insurer/DA Code: 996 and Name: OrgPh PH

Delete

Cancel

You can also delete a Policyholder by selecting the bin icon in the “Action” column on the first screen where you can view all Policyholders. This will present the user with the same pop-up information.

Full Name ▼	User Name	Authorisation Status	Date Created / Amended	Authorisation	Action
sce4 278	sce4278@gmail.com	Requires Authorisation - Delete Policy	07/11/2023	✓ ✗	

To authorise the deletion of the Policyholder if not an L2, another L2 or L3 user will need to authorise this by selecting the tick under the Authorisation column.

Full Name	User Name	Authorisation Status ▼	Date Created / Amended	Authorisation	Action
sce7 278	sce7289@gmail.com	Requires Authorisation - Unlock	07/11/2023	✓ ✗	
Scenario3 27835	Scenario3_27835@mailinator.com	Requires Authorisation - Unlock	30/10/2023	✓ ✗	
Hira Gargiya	a12111bc12@gmail.com	Requires Authorisation - New User	26/10/2023	✓ ✗	

If an action needs to be declined, the user needs to press the X icon in the authorisation column.

7.6 Lock/Unlock a Policyholder

If a user no longer requires access to policies, or their account is under review a L2 or L3 user can lock their account. This will only lock the user with policies associated to your Insurer/DA account, this will not lock the user out of Navigate if they have access to update policies for other organisations.

If account needs to be locked then you select yes, this will present you with an additional drop-down selection, where you’ll be required to choose the reason for locking their account then submit the change.

[View/Edit Policyholder](#)

Delete Policyholder
Back to Policyholders

Insurer/DA Code: 996

User Type: Policyholder-Vehicle Update Only	Forename: forename
Insurer: EXPERIAN TEST1	Surname: surname
Insurer Branch:	Email Address: abc132@gmail.com
DA:	
DA Branch:	

Account Locked/Unlocked: Yes ▼

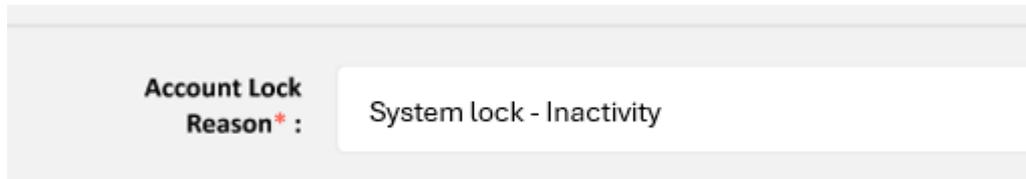
Account Lock Reason*: Select Option ▼

Does not need account

Account under review

Add Policy

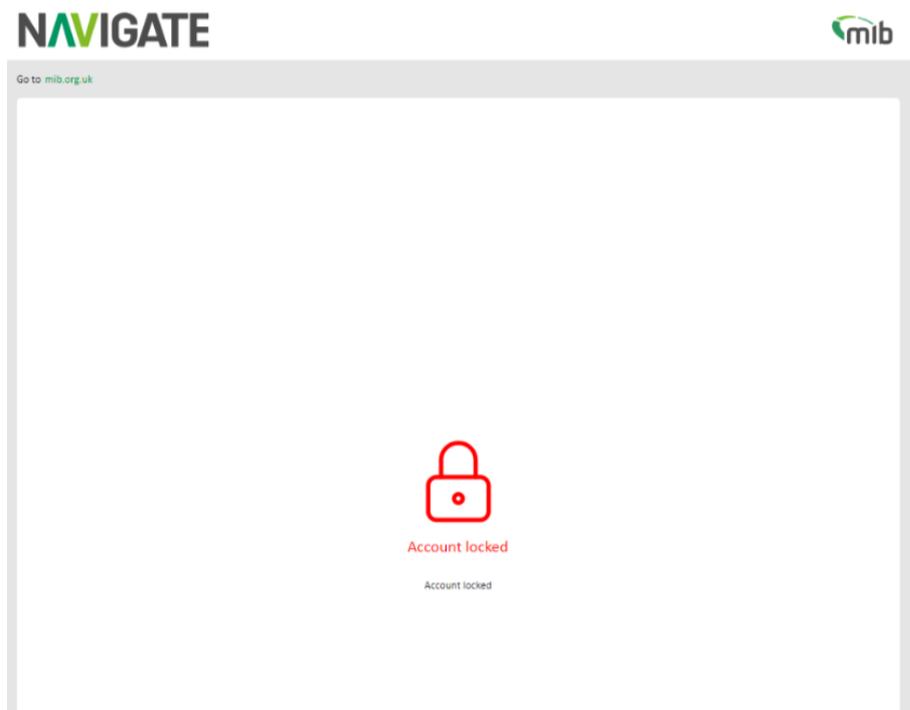
If a user is locked out as they have been inactive for 90 days, this will display the user as: "System Lock – Inactivity". The helpdesk user should ensure this is marked as unlocked to assist in troubleshooting.



An L2 user can lock the account without authorisation, if an L3 user, authorisation is required and will be put into the queue of work as "Requires Authorisation – Lock" once the action has been submitted. A L2 or L3 user will authorise or decline the action.

MICHAEL JOHN	san@mail.com	Requires Authorisation - Lock	03/11/2023	✓ ✗	✎ 🗑
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The policyholder will be informed via email that their account is locked and will be shown the following screen when logging in. If they're insured elsewhere, they will still have access to Navigate, but only for the policies by other insurers.



An L2 or L3 user can unlock the policyholders account if required by selecting "No" in the drop down next to Lock account, followed by the same steps above. The action to be authorised will be shown as "Requires Authorisation – Unlock"

If the user is not showing as locked on their profile, but are receiving a locked screen they may be locked due to incorrect password attempts, or if they have not activated their account. If the

policyholder has tried unlocking their account but has failed to access, the insurer Helpdesk will need to raise a support ticket to MIB. Select “Help” to raise a contact us ticket on behalf of the policyholder.

7.7 Add/remove/edit policy access for a policyholder

From the “User Admin” tile search for the policyholder and select the users name or pen icon, this will open the Policyholder Management page.

The bottom of the screen will display a table with the policy numbers the policyholder has access to. You can add a new policy number, edit or delete any existing policy number, using the appropriate “Add Policy” button, bin or pen icon under the Action column.

To add a policy, select “Add Policy”, enter the policy number assigned to the user and Access Code if applicable.

forename surname has access to 2 policies Add Policy

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
000000000001	EXPERIAN TEST1				Authorised	25/08/2023		 
000000000002	EXPERIAN TEST1				Authorised	05/01/2024		 

Displaying Results 1 to 2 of 2 < 1 > Show: 10 Rows ▾

Add new policy - forename surname ✕

Policy Number

Access Code

Cancel Add

Navigate will recognise a L2 user adding a new policy and update the policyholder’s table.

If a L3 user were to add a policy this will be put into the queue of work on the policyholder table or view all policyholders table to be authorised by a L2 or another L3 showing “Requires Authorisation – **New Policy**”.

Policy/Access No.	Insurer	Branch	DA	Branch	Authorisation Status	Date	Authorisation	Action
UATPERFTEST16 2	EXPERIAN TEST1	Testing			Requires Authorisation - New Policy	05/01/2024	✓ ✗	 
UATPERFTEST16 3	EXPERIAN TEST1	Testing			Authorised	27/10/2023		 

To remove a policy from a policyholder, click on the bin icon under the action column, again a prompt will appear asking if you're sure you want to delete the policy. A L2 user will be able to remove the policy straight away, a L3 users work will require authorisation.

Remove policy access
✕

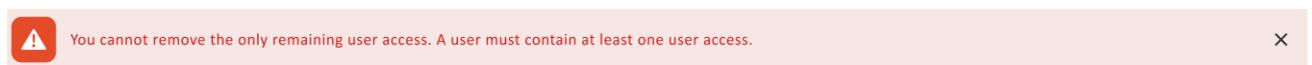
Are you sure you want to remove policy access from this user?

Keep this policy

Remove

An L2 or different L3 will action this request by selecting the tick or cross on "Requires Authorisation - Delete Policy" row.

Please note, you cannot delete the last remaining policy access, if the policyholder no longer requires access, you must then delete the policyholder. You'll see the following error if this is the case:



7.8 Export a policyholder email list

Select "User Admin", then select "Export Policyholder List" button. A .csv file can be downloaded containing details of policyholders.

The web browser may prompt asking if the file is to be opened or saved.

If opened, then the Excel spreadsheet will be displayed which contains Insurer/DA Code, Forename, Surname, and user email address.

N8				
	A	B	C	D
1	Insurer/DA Code	Forename	Surname	User email address
2	996	ADD	TEST	Gph1@mailinator.com
3	996	AJITH	VENKA	BAT_INSHelpdeskL5@mailinator.com
4	996	BAT	INSHelpde	BAT_INSHelpdeskL2@mailinator.com
5	996	BAT100	Test100	battest98@mailinator.com
6	996	BAT108	Test108	battest108@mailinator.com
7	996	BAT11111	Test11111	battest1111@mailinator.com
8	996	BAT11111	Test11111	battest11111@mailinator.com

File Transfer

**Review File Transfers made by your
organisation and your Policyholders**



8 Request a File Transfer

The File Transfer tile contains the downloadable file transfer Standard File Format template and facilitates the upload of a completed file in .CSV format.

8.1 Downloading the Standard File Template

Using the SFF template you can send details of new vehicles and amendments to existing records, and delete records added in error. Many vehicle records can be included in a single file with a different record type used for each type of update.

Request a File Transfer
Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.

Transfer Type: **Download Standard File Template**

File Name:

1 Requests have been submitted between 28/02/2024 28/02/2024

File Request ID: DA ID: User Name: Show Status: Show All

Date/Time File Uploaded	File Request ID	Record Count	DA ID	User Name	Date Results File Created	File Upload Method	File Upload Status
28/02/2024 09:14:56	202459000010	1		HelpdeskLvl2@Mailinator.Com	28/02/2024 09:20:01	Attended/SFTP	COMPLETE

Displaying Results 1 to 1 of 1 Show: 10 Rows

- 1) Select “Download Standard File Template”; you’ll have an option to open or save the template. It’s recommended that you **save** the template in Excel so you can access it on your own computer at any time.

Note – Some organisations have security restrictions on downloading files. You may need to request help from your IT department if this happens.

8.2 The Standard File Format

The blue columns with **red** headings at the top of the template are mandatory:

- Record Type (this will always be V for vehicle records)
- Update Type (this will be N (New), A (Amend) or delete. Delete may be “D” for deleting all records for a VRM or “O” for deleting a single record)
- Policy number - **must** be included for every single record.
- The Foreign Registration Indicator must always be U

- VRM (Vehicle Registration Mark/Number)
- Trade Plate Indicator (this must always be populated – either with T (Trade Plate) or U for a standard UK registration)
- Vehicle On-date as DD/MM/YYYY
- Vehicle Off-date as DD/MM/YYYY

It is recommended that the other fields (with **blue, orange & black** headings) are also completed.

8.3 Saving the file

When the fields have been completed, select **Save** in the template (cell A5) and the information will be checked. If there are validation errors, you'll receive an error message and will need to correct the data.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
5	Record Type	Update Type	Insurer ID	Insurer Branch ID	Quoteback	Delegated Authority ID	DA Branch ID	Policy Number	Foreign Registration Indicator	VRM	Trade Plate Indicator	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Derivative
6															
7															
8															

If there are no errors, you'll need to follow the prompt to name the file and save the file as a CSV type (.csv) ready for uploading to the database. Refer to 6.5.

When you close the workbook, you'll be asked if you want to save the changes made to "Standard Template.xls?", you do not need to save the file again when closing, but if you want to keep a copy of the data or re-use the data at a later date, it is recommended that the file is saved as an Excel Workbook (.xls) so that it can be easily opened and viewed. To do this, change the file name (so that the downloaded "empty" standard template is not saved with data in it) and select "Save" to save the workbook.

8.4 Copying the data and re-using the template

Details about copying the data and re-using the template are in Appendix A below.

8.5 Updating vehicle schedules using Standard File Transfer

For Standard Files, only new vehicles or amended information i.e. a vehicle off cover date should be uploaded. It is not necessary to include all details of vehicles in your fleet as this could lead to incorrect information on to Navigate.

A NEW record must be uploaded when a vehicle enters the fleet and is not on Navigate.

A NEW record should also be uploaded when further periods of cover for the same vehicle occur.

An Amend record type must be uploaded when a vehicle leaves the fleet and the record on to Navigate requires the off-cover date to be changed.

A Delete record should only be used when you need to remove records for a vehicle.

Further details on updating the database using a Standard File Template can be found in Appendix B

8.6 Locate and submit a file

The File Transfer function will allow you to select a file for submitting vehicle records.

1. Select “Browse” to find the completed file template saved on your computer
2. Select “Submit” to send the file to Navigate.

Request a File Transfer

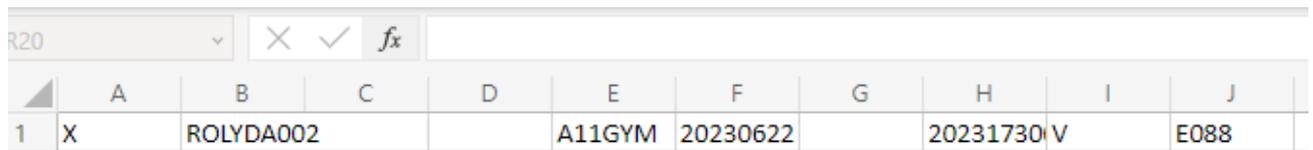
Select the file you want to transfer and click Submit. The file details must be entered in the corresponding File Template document and saved in .csv format.



When a file is successfully submitted, a message is displayed and a “Results File” email is sent, showing the File Request ID assigned. Where the file format is not correct, a “Results File” email is sent to advise this is the case.

A Results File for successful load will show “THIS FILE HAS BEEN SUCCESSFULLY LOADED”

A Results File with errors and warnings will provide the error and warning codes.



	A	B	C	D	E	F	G	H	I	J
1	X	ROLYDA002			A11GYM	20230622		20231730	V	E088

It’s important that the errors and warnings are acted upon to ensure the vehicle is on *Navigate* and the data is correct. An explanation of errors and warnings are available to view in Appendix E below.

8.7 View the status of a file

On the File Transfer screen, you can monitor the progress of all files submitted by all users for your organisation, this will by default always show files submitted on today’s date.

You can use the date fields to view historical files submitted up to 40 days prior. Ensure you select “Refresh” to activate the new date range.

User the “Show Status” filter to look at fields received, processing, on hold, complete and rejected. The default view is “Show All”.

8.8 View a summary of a file request and export a results file

You can view a summary of a file by selecting the File Request ID number.

This will display the details of the file results, as shown below:

Export Result File

Back to File Transfer

FILE SUMMARY

No. of records in file : 1

- Accepted (0) (0%)
- Rejected with Errors (1) (100%)
- Accepted with Warnings (0) (0%)

FILE DETAILS

File Status:	Accepted with Errors	Last Status Changed:	C99 To H10
File Received on Server:	08/02/2024 09:01:40	Change Made On:	08/02/2024 09:06:55
File Transfer Began:	08/02/2024 09:06:15	Updated By:	52
File Transfer Completed:	08/02/2024 09:06:15	Sent to Database:	08/02/2024 09:06:15

TOP 5 ERRORS

Code	Status	No.
ⓘ E103	User ID Not Authorised	1
ⓘ E100	Policyholder cannot set Foreign Registration Indicator	1
ⓘ E016	Insurer ID Not Known	1

TOP 5 WARNINGS

Code	Status	No.
No data available in this table		

Further details of the status of a file can be seen when selecting any field that is green in colour and underlined

e.g.

If you need a copy of a results file, you can export this by selecting “Export Results File”.

Home / Motor Insurance & Policy Data / File Transfer / File Request Id 1247337482_01_109

Search

ⓘ File Request ID 1247337482_01_109

Export Result File

Back to File Transfer

You'll then be prompted to confirm if you want the Results File CSV to be opened or saved. The file will be of the following format if there are any errors or warnings, showing the policy number, the vehicle registration number the date the file was uploaded and the error/warning codes.

If you've successfully loaded your file without any errors or warnings, the results file will state the following "THIS FILE HAS BEEN SUCCESSFULLY LOADED".

Data Submissions

Review your SFTP Data Submissions



9 Monitoring Data Submission

In Navigate, Batch Monitoring is now called Data Submissions. If you've the required access, you'll need to select the Data Submissions tab. By default, this will show you all the files and file types which have been submitted from the past 40 days, up until the date of the last submission.

You can change the date at the top of the page by using the date/calendar widgets to show files you've submitted. Use the other filter options to narrow down your search of submissions.



Additionally, you can use the "Show File Status" drop down to look at all files that are processing, on hold, complete etc.

Please check your SFTP folder for your results files.

The screenshot shows the 'Monitor Your Data Submission' interface with a table of data submissions. The table has the following columns: Site No., File Seq. No., Supplier ID, Date/Time File Received, Record Count, File Name, File Type, Date/Time Result File Created, File Status, and % Accepted. The table contains 23 rows of data. The 'File Status' column shows various statuses such as 'Entire Batch Rejected', 'Batch Completed', and 'File Out Of Sequence'. The '% Accepted' column shows percentages ranging from 0% to 100%.

Site No.	File Seq. No.	Supplier ID	Date/Time File Received	Record Count	File Name	File Type	Date/Time Result File Created	File Status	% Accepted
801	12	085	20/12/2023 14:56:48	0	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-20T14:56:18	MID1	20/12/2023 14:56:48	Entire Batch Rejected	
801	12	085	20/12/2023 15:36:11	2	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-20T15:36:33	MID1	20/12/2023 15:37:00	Batch Completed	100%
801	13	085	20/12/2023 16:06:02	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-20T16:06:29	MID1	20/12/2023 16:07:05	Batch Completed	100%
801	14	085	21/12/2023 04:01:07	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T04:01:49	MID1	21/12/2023 04:02:27	Entire Batch Rejected	0%
801	14	085	21/12/2023 08:56:46	0	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T08:56:16	MID1	21/12/2023 08:56:46	File Out Of Sequence	
801	15	085	21/12/2023 09:12:05	0	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T09:11:23	MID1	21/12/2023 09:12:05	Entire Batch Rejected	
801	15	085	21/12/2023 14:45:59	6	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T14:46:30	MID1	21/12/2023 14:47:00	Batch Completed	100%
801	16	085	21/12/2023 15:25:54	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T15:26:26	MID1	21/12/2023 15:26:54	Batch Completed	100%
801	16	085	22/12/2023 04:32:11	0	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-22T04:31:42	MID1	22/12/2023 04:32:11	File Out Of Sequence	
801	17	085	21/12/2023 17:01:26	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T17:01:51	MID1	21/12/2023 17:02:27	Batch Completed	100%
801	18	085	21/12/2023 17:25:51	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T17:26:19	MID1	21/12/2023 17:26:42	Entire Batch Rejected	0%
801	19	085	21/12/2023 18:01:11	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2023-12-21T18:01:57	MID1	21/12/2023 18:02:32	Batch Completed	100%
801	20	085	02/01/2024 04:35:44	4	UKMILTESTDAU085.SITE801.INPUT.EFT_2024-01-02T04:36:09	MID1	02/01/2024 04:36:38	Entire Batch Rejected	75%
801	20	085	02/01/2024 06:20:40	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2024-01-02T06:21:01	MID1	02/01/2024 06:21:27	Entire Batch Rejected	0%
801	21	085	02/01/2024 07:10:39	1	UKMILTESTDAU085.SITE801.INPUT.EFT_2024-01-02T07:10:57	MID1	02/01/2024 07:11:25	Entire Batch Rejected	0%
801	22	085	02/01/2024 07:40:39	6	UKMILTESTDAU085.SITE801.INPUT.EFT_2024-01-02T07:41:02	MID1	02/01/2024 07:41:32	Batch Completed	100%
801	23	085	02/01/2024 08:15:50	2	UKMILTESTDAU085.SITE801.INPUT.EFT_2024-01-02T08:16:14	MID1	02/01/2024 08:16:50	Batch Completed	100%

9.1 Summary of the Data Submissions

If you need to see a more detailed view of a data file submission, you'll need to select an individual file name, and select the "Click for file information" button, shown in green below.

Monitor Your Data Submission(s)

This page enables you to view the status of the data submitted

1 Requests have been submitted between

Click for file information

Site No: File Seq. No: Supplier ID: File Type:

Site No	File Seq. No.	Supplier ID	Date/Time File Received	Record Count	File Name	File Type	Date/Time Result File
001	50	996	01/01/2024 00:00:00	2606	UKMI.UAT.UKFI.TUIN.D2021182.T1601279	MID2	31/05/2023 11:45:37
001	56	996	01/01/2024 00:00:00	2606	UKMI.UAT.UKFI.TUIN.D2021176.T1413132	MID2	31/05/2023 11:45:37
001	50	996	01/01/2024 00:00:00	404	UKMI.UAT.UKFI.TUIN.D2021176.T1309084	MID1	31/05/2023 11:43:19
001	50	996	01/01/2024 00:00:00	404	UKMI.UAT.UKFI.TUIN.D2021180.T1320331	MID1	31/05/2023 11:43:19
001	50	996	01/01/2024 00:00:00	404	UKMI.UAT.UKFI.TUIN.D2021180.T1416352	MID1	31/05/2023 11:43:19
001	54	996	01/01/2024 00:00:00	404	UKMI.UAT.UKFI.TUIN.D2021176.T1311090	MID1	31/05/2023 11:43:19
001	4	996	01/01/2024 00:00:00	396	UKMI.UAT.UKFI.TUIN.D2021179.T1010238	MID1	31/05/2023 11:43:19
001	5	996	01/01/2024 00:00:00	279	UKMI.UAT.UKFI.TUIN.D2021176.T1205035	MID1	31/05/2023 11:43:19

Or right click, select “Drill through” then choose “File Information”.

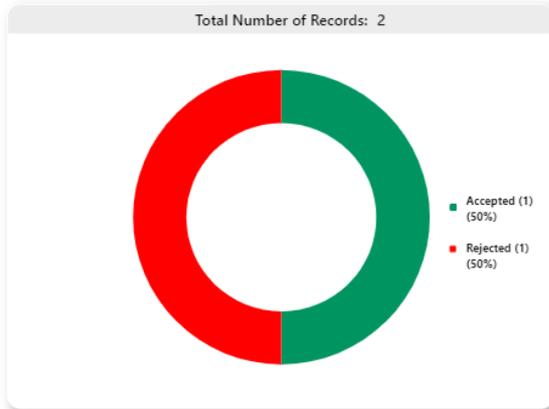
Site No	File Seq. No.	Supplier ID	Date/Time File Received	Record Count	File Name
802	12	085	21/12/2023 15:21:03	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2023-12-21T15:21:03
802	19	085	02/01/2024 03:50:37	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-02T03:50:37
802	20	085	02/01/2024 04:20:39	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-02T04:20:39
802	47	085	02/01/2024 05:05:51	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-05T05:51:05
802	11	085	21/12/2023 15:21:03	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2023-12-21T09:51:05
802	21	085	02/01/2024 05:21:05	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-02T05:21:05
802	22	085	02/01/2024 06:16:16	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-02T06:16:16
802	48	085	02/01/2024 07:06:16	20	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-02T07:06:16
802	46	085	05/01/2024 05:20:41	8	UKMI.TEST.DAU085.SITE802.INPUT.EFT_2024-01-05T05:20:41

This will then bring you to a new screen showing you a summary of the details.

Further details of the status of a file can be seen by selecting any field that is green in colour and underlined.

File sequence number 55

FILE SUMMARY



FILE DETAILS

[Back to File Status](#)

File Status:	H10 Batch Completed	File Updated On:	05/01/2024 10:06:33
File Sequence No:	55	Last Status Change:	D10 To H10
Site No:	801	Change Made On:	05/01/2024 09:52:16
Type of file:	MID1	Received File:	UKMI.TEST.DAU085.SITE801.INPUT.E...
File Received On:	05/01/2024 09:50:58	Results File:	UKMI.TEST.DAU085.SITE801.OUT...
QA Completed On:	05/01/2024 10:06:33	Updated By:	1

TOP 5 ERRORS

Code	Status	No.
E026	INVALID DATE OF EXPIRY	1

TOP 5 WARNINGS

No warnings found.

Code	Status	No.
------	--------	-----

An explanation of file status codes can be found in Appendix D below.

This 3-character code must exist on the insurer's own code list that has previously been supplied to Navigate.

Code	Status	No.
E118		
E024		
E022	PERMITTED DRIVER CODE NOT ON LIST 13	

Further details of the Errors and Warnings can be displayed by selecting the code.

To return back to the Data Submissions main page, click on the "Back to File Status" button at the top of the page.

Appendices

Additional information to support users.



10 Appendices

10.1 Appendix A Copying the data and re-using the Excel template

The Navigate data Excel template is “Protected”, so that the fields of the data are checked and the validation of the file is not lost. It is not possible to copy a row of data and paste it into another row (or another copy of the template). If you wish to copy the data for a particular vehicle (e.g. to create an “Amend” record, you’ll need to use the original file, amend it and save the changes with a different filename. This can be done in two ways:

- Amend the CSV file in “Notepad” rather than Excel
- Use previous Excel file saved as a template and re-save it with a different name

Amending the CSV using “Notepad”

Step 1 – when you create the “New” record, save the file as a CSV as explained previously

Step 2 – when you re-use the contents of the file, use “File Explorer” to locate the file. Open the file using “Notepad” rather than Excel. You can do this by right-clicking on the file and selected “Open with..” and a notepad option.

This will open the file as below. As long as you do not remove any commas, or change the data incorrectly, this file be used as the basis for the updated record.

```
File Edit Format View Help
V,N,520,,,,,ROLYDA002,U,A11GYM,U,CAR,RENAULT,MEGANE,,,,,20230622,20231215,,,,,,,,,,,,,
```

Step 3 – The examples below shows a vehicle A11GYM having a change to an off cover date of 15/09/2023 by the use of a change to the record type A for Amend. No other changes to the record type are required.

```
File Edit Format View Help
V,A,520,,,,,ROLYDA002,U,A11GYM,U,CAR,RENAULT,MEGANE,,,,,20230622,20230915,,,,,,,,,,,,,
```

Step 4 – The file should be saved a CSV file (N.B. the file will not be validated) by typing “.csv” after the file name and ensuring the file type is either CSV or All files. If the file details to “.text” you must change it as Navigate will not accept it.

It is also possible to merge multiple files together using this approach, simply by copying and pasting the lines of test in the CSV file together, as long as the format is correctly retained.

Re-using the template

Step 1 – when you create the “New” record, save the file as an Excel file template (.xls) as explained in “Saving the file” as well as a CSV (.csv version) (remember that you cannot submit a .xls version to the data base).

Step 2 – you can now re-use the file when you wish to change it, simply by opening the Excel (.xls) file as normal and changing the necessary fields.

Step 3 – In order to change the vehicle record, you must change the update type (currently “N”) to “A” (Amend). If, for example the vehicle ceases to be on cover on 31st May 2023, you should change the off date to 31/5/23 – (which will be changed to 20230531 as usual by the template).

Step 4 - The file can then be saved as a CSV for upload to the data base using the “Save” button in cell A5 to validate it and save it.

10.2 Appendix B Updating the vehicle schedules via Standard File Transfer (SFT)

First file loaded – the vehicle record should be set to N (for New), to add it to Navigate.

1/1/23 -----31/12/23 (N) VRM1

Second file loaded – An existing vehicle is taken off cover via an Amend record (A) and another added via a New record (N).

1/1/23 -----31/5/23 (A) VRM1

3/3/23 -----30/6/23 (N) VRM2

Result: Records relating to VRM1 will have the off date amended to 31/05/23 these will remain on Navigate with the new off date.

Correcting incorrect vehicle cover dates

If there is a record on Navigate with incorrect cover dates (this can be the on or off date or both) then you’ll need to delete the record and replace it with a New record with the correct cover dates. Please note this is not the method used when simply taking a vehicle off cover as only an Amend record is required with the new off cover date Extending vehicle cover dates If there is a record with an off-cover date that needs to be extended then you’ll need to submit a further New record with on cover and off cover dates for the extended period. Please note in this scenario the on date in the record should not be the date the of the original record loaded to Navigate but the start date of the extended period.

Changing vehicle details

Where vehicle details change partway through the cover period (i.e. the engine size increases) and this change needs to be reflected on Navigate then you’ll need to submit an amend record with an off-cover date of when the change took place and an off-cover date that matches the existing record.

10.3 Appendix C File Transfer Status'

Code	Meaning	File status
C10	Ready for QA	Processing
C99	AQ in progress	Processing
D10	ready for Add/Update	Processing
D99	Add/Update in progress	Processing
G99	Results in Progress	Processing
H10	Batch Completed	Completed

10.4 Appendix D Data Submissions Status'

Code	Meaning	File status
A20	Errors found during login	On Hold
A25	File out of sequence	On Hold
C10	Ready for QA	Processing
C20	Entire Batch Rejected	Rejected
C50	Failed acceptance Threshold	On Hold
C60	Awaiting previous batch	On Hold
C99	AQ in progress	Processing
D10	ready for Add/Update	Processing
D99	Add/Update in progress	Processing
G10	Ready for Reject Process	Processing
G99	Results in Progress	Processing
H10	Batch Completed	Completed
Z50	Hold - No further Action	On Hold

10.5 Appendix E Errors and Warnings codes and areas to investigate

Error / Warning Code	Description	Area's To Investigate
E001	FIRST RECORD IN FILE NOT RECORD TYPE H OR B	Check that the first record in the file is a Header record and begins with the letter "H" for a Phase 1 file or "B" for a Phase 2 file.
E002	SUPPLIER TYPE NOT I OR D	The sixth character of the Header record should be an "I" to indicate an Insurer or "D" to indicate a Delegated Authority.
E003	SUPPLIER ID NOT KNOWN	This is a 3-digit number in the Header record that tells Navigate who the file is being sent by. This is often referred to as an "Insurer ID" or a "DA ID". This number should match your own unique Supplier ID.
E004	INVALID TEST INDICATOR	This should be set to "1" for a test transmission or "0" for a Live transmission.
E005	INVALID FILE SEQUENCE NUMBER	The sequence number in the Header and Trailer record should match, if they do not this error will be generated.
E006	FILE NUMBER OUT OF SEQUENCE	The file sequence number is a field in the header record and must be incremented by 1 for each file, except if all records in a file were previously rejected. The file sequence number field is right justified with leading zeroes. If this number is not the next expected sequence number, this error will be reported.
E007	INVALID FILE PRODUCTION DATE	The file production date is in header and must be equal or greater than the last file production date reported if this error has been reported this may not be the case.
E008	FILE PRODUCTION DATE IN THE FUTURE	This error will be produced if the File Production Date is greater than the current date.

E009	LAST RECORD IN FILE NOT RECORD TYPE T OR Z	Check that the last record in the file is a Trailer record and begins with the letter “T” for a Phase 1 file or “Z” for a Phase 2 file.
E010	NON-NUMERIC RECORD COUNT	The record count is characters 8-16 of the Trailer record and is right justified with leading zeroes. This field reports the total number of records that Navigate should be expecting in the file. If this error has been reported check that the field does contain letters or that the field is not incomplete. This will stop the file from processing and no records within the file will be accepted.
E012	INVALID FILE VERSION NUMBER	This refers to the File Version Number in the Header record. This is a mandatory field and must show 0001.
E013	SITE NUMBER NOT KNOWN	Some insurers/delegated authorities have different sites set up for submitting data and this number should match the corresponding number that the file is being submitted for. If you do not use multiple sites, then this field will still have to be completed and will probably be “001” for an insurer and “801” for a delegated authority.
E014	INVALID RECORD TYPE	The first character of each record indicates the record type. The valid record types are as follows: H – Phase 1 Header Record B – Phase 2 Header Record T – Phase 1 Trailer Record Z – Phase 2 Trailer Record P – Phase 1 Policy Record F – Phase 2 Policy Record E – Phase 1 Short Form Record V – Phase 2 Vehicle Record
E015	UPDATE TYPE OF POLICY RECORD NOT N, A, D OR C	The update type is the second character of each record. The valid update types are as follows: N – New A -Amend D – Delete R – Renewal for Policy Record

E016	INSURER ID NOT KNOWN	This field identifies which underwriting insurer the update is relevant to. If the record is being sent by an insurer who is supplying any update for their own policy, this number should be their own ID. If a delegated authority that has authority to supply data on behalf of an insurer is making the update, this field should be populated with the relevant insurer ID.
E017	DELEGATED AUTHORITY ID NOT KNOWN	If an insurer is submitting the file this field should be left blank. If the file is being submitted by a delegated authority this field should be populated with the 3-digit delegated authority ID. This error may indicate that a DA is not authorised to supply for a particular insurer.
E019	INVALID POLICY NUMBER	This refers to the policy number field in the policy record. This error will be generated if the field is populated with either all blanks or all zeroes or a combination of both.
E020	INVALID VEHICLE REGISTRATION MARK FORMAT	The vehicle registration mark must be in a valid Great Britain, Northern Ireland, Channel Islands or Isle of Man registration format otherwise the record will be rejected. Valid vehicle registration formats can be found in Appendix C of the Functional Spec. Non-UK registration formats will not cause the record to reject provided that the field "Foreign Registration Format" is populated with an "F".
E021	INVALID PERMITTED DRIVER CODE	This field must be populated with either a Permitted Driver Code used by the insurer (previously submitted to Navigate) or be a code on default permitted driver code list.
E022	PERMITTED DRIVER CODE NOT ON LIST 13	This 2-character code must either exist on the Default Permitted Driver Code List (previously known as Instep Code List 13), or on the insurer's own code list that has previously been submitted to Navigate.
E023	PARTY POLICY CONTROL COUNT OUT OF SEQUENCE	The Party Policy Control Count (PPCC) is a field that must be incremented by 1 for each version of a policy. If this PPCC submitted is not the next expected this

		error would be reported. Where a record was rejected, the rejected PPCC must be re-used.
E024	INVALID CLASS OF USE CODE	This 3-character code must exist on the insurer's own code list that has previously been supplied to Navigate.
E025	INVALID EFFECTIVE START DATE	This error indicates that the start date does not follow the format CCYYMMDD, for example 20241231.
E026	INVALID DATE OF EXPIRY	This error indicates that the expiry date does not follow the format CCYYMMDD, for example 20241231.
E027	INVALID CANCELLATION/LAPSE INDICATOR	If the policy is not being cancelled or lapsed this field should be left as a space. If the policy is being cancelled or lapsed one of the following values must be used. C – Cancellation L – Lapse
E028	POLICYHOLDER NAME NOT PRESENT	This field must be completed and be at least 2 characters in length.
E029	ADDRESS LINE 1 NOT PRESENT	This field must be completed, at least Address Line 1 must be present.
E030	DRIVING OTHER CARS NOT Y OR N	This field must be either "Y" for yes, "N" for no or space. If a company this must be set to space.
E031	NUMBER OF NAMED DRIVERS NOT IN RANGE 0-6	This field must be 0 to indicate no Named Drivers are present, or a number in the range 1-6.
E032	INVALID FOREIGN REGISTRATION INDICATOR	This field must be set to "F" to indicate a foreign vehicle registration format or "U" to indicate a UK vehicle registration format.
E033	NAMED DRIVER NAME NOT PRESENT	If indicated on the record that there are Named Drivers, then this field will be expected to be completed the same number of times indicated in the number of named drivers' field. This field must be at least 2 characters in length.

E034	INVALID COMPANY NAME INDICATOR	This field must be populated with either a "C" to indicate that the policyholder is a company/partnership, or "P" to indicate that the policyholder is a person.
E035	UPDATE TYPE IS A AND EXISTING RECORD NOT FOUND	This error is returned when an Amend record is submitted and no corresponding existing record is found on Navigate. This may indicate that the original New record was not accepted.
E036	INVALID RECORD COUNT ON TRAILER RECORD	The record count is characters in the Trailer record and is right justified with leading zeroes. This field reports the total number of records that Navigate should be expecting in the file. If this field does not match the total number of records in the file (including the Header and Trailer records) this error will be produced.
E037	INVALID FILE PRODUCTION TIME	This field must be in a valid time format HHMM (24-hour clock) or zeroes if not present.
E038	INPUT RECORD TOO LONG	The record submitted is longer in length than specified in the functional spec and cannot process, as it does not conform with the acceptable format.
E039	VEHICLE INSTEP CODE NOT KNOWN	The Instep Server Standard Code identifies vehicle make and model. The full code must be supplied (8 characters in length) otherwise the field must be populated with zeroes. If the Vehicle Make and Model is also present in the record, the Instep Code will be used.
E040	VEHICLE COVER TYPE NOT KNOWN	Will only be used at present to indicate that a vehicle is laid up and has no RTA cover. If this field is being populated, then it must be one of the following values: Accidental Damage, Fire & Theft - 05 Fire & Theft Only - 04 Fire Only - 03 Suspended – Accidental Damage, Fire & Theft - 18 Suspended – Fire & Theft - 20 Suspended – No Cover – 19

E041	NO. OF NAMED DRIVERS FIELD DOES NOT MATCH DRIVERS	The number of Named Drivers that has been indicated in the Number of Named Drivers field does not match the number of details actually submitted for named drivers.
E042	INVALID EXCLUDED DRIVER FLAG	This field must be populated with "E" to indicate that the Named Driver is excluded from driving under the policy otherwise this should be populated with a space.
E043	EFFECTIVE START AND EXPIRY DATE MUST BE THE SAME	This error is returned in respect of a long form delete, cancellation or lapse. For these records the effective and expiry dates must be the same.
E045	ANOTHER RECORD IN THIS POLICY SET WAS REJECTED	This relates to multiple vehicle policy sets. This error will occur when there is error on of the policy amendments, all amendments for that for that policy record will fail. This error will probably be accompanied by at least one other which has caused this error to be produced.
E047	POLICY DETAILS NOT THE SAME THROUGHOUT POLICY SET	Some details in the update are not consistent with other details in this policy set, such as PPCC or dates etc, and cannot be accepted.
E048	UPDATE TYPE IS N AND EXISTING RECORD FOUND	The update submitted on the policy record is "N" for NEW but an existing version of the record has been found on Navigate.
E049	BACKDATED ENDORSEMENTS ARE NOT PERMITTED	This error will occur when policy amendment is sent to load with an effective date prior to the last effective date of a record loaded for that policy.
E050	NO MATCHING RECORD FOUND FOR DELETE	The policy record submitted has attempted to Delete a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted.
E051	INCORRECT ADDITIONAL DRIVER IND – LESS THAN 6 NAMED DRIVERS	This field must be populated with "Y" to indicate that there are named drivers details or else a space if there are no additional drivers.
E052	SHORT FORM CANCELLATION WITH FUTURE DATE	A short form cancellation cannot be future dated, this error indicates that the date submitted is in the future.

E056	ADDITIONAL DRIVER INDICATOR NOT = Y OR SPACE	The Additional Drivers Indicator is used to indicate that there are more than 6 named drivers insured to drive under the policy. This field must "Y" for Yes or a space. This field must not be populated with "Y" unless all 6 driver positions have already been filled.
E057	DUPLICATE VEHICLES IN POLICY SET	This is a Phase 1 error only and this error indicates that that same vehicle has been sent in more than once in the same policy set.
E058	MORE THAN ONE TRAILER RECORD FOUND	This error indicates that there were two or more trailer records found in the file submitted. If any other records begin "T" or "Z" this record will be recognised as a trailer record.
E059	MORE THAN ONE HEADER RECORD FOUND	This error indicates that there were two or more header records found in the file submitted. If any other records begin "H" or "B" this record will be recognised as a header record.
E060	TRAILER RECORD NOT FOUND	This error has been generated because Navigate could not find a trailer record in the file submitted. This maybe because the last record in the file is not a trailer record or that the trailer record has an incorrect record type.
E061	HEADER RECORD NOT FOUND	This error has been generated because Navigate could not find a header record in the file submitted. This maybe because the first record in the file is not a header record or that the header record has an incorrect record type.
E063	CANCELLATION/LAPSE FOR UNKNOWN VEHICLE	The record submitted has attempted to Cancel/Lapse a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted.
E064	CANCELLATION/LAPSE FOR DIFFERENT NUMBER OF VEHICLES	This error maybe produced if trying to cancel a vehicle from a multiple vehicle policy set that has not been loaded to the policy previously.

E066	LONG FORM CANCEL/LAPSE CANNOT BE BACK DATED	A cancellation/lapse record has been submitted in long form format but has a date prior to that of the last amendment.
E067	EXPIRY DATE EARLIER THAN EFFECTIVE DATE	The expiry date of a record may not be prior to the effective date, this error indicates that this is the case.
E068	ATTEMPT TO CANCEL AN ALREADY CANCELLED POLICY	A record to cancel a policy has been submitted for a policy that has already been cancelled.
E069	FIRST RECORD IN FILE NOT RECORD TYPE B	This error indicates that the correct Header record could not be found in the Phase 2 file submitted. This maybe because the first record in the file is not a header record or that the header record has the record type "H".
E070	INVALID TRADE PLATE INDICATOR	This field must be populated with "T" if the VRM is a trade plate, or else "U". This indicator will identify the Vehicle Registration Mark as a Trade Plate. The VRM will be passed through UKVD for validation. Where the Trade Plate Indicator has been set to "T" and a UKVK warning is found, or the registration is not found, a warning message will be generated to say that there is a possible problem with the VRM but will also state that the VRM has been submitted as a Trade Plate.
E071	INVALID MOTOR TRADE POLICY INDICATOR	This field identifies the policy as being a motor trade policy in which case the must be populated with "Y". If the policy is not a motor trade policy the field should be populated with a space.
E072	INVALID VEHICLE ON DATE	Must be a valid date in the format CCYYMMDD, for example 20241231. The Vehicle On date cannot be after the vehicle off date. Where the insurer is supplying the Vehicle on Date, this field can be backdated to any date in the past, provided that the insurer covered the policy during that time and can be future dated anytime between the current date and the policy Expiry Date. Where the policyholder is supplying the Vehicle On Date, this field can be backdated up to 14 days from the current date and can

		be future-dated to any date between the current date and the policy Expiry Date.
E073	INVALID VEHICLE OFF DATE	Must be a valid date in the format CCYYMMDD, for example 20241231. The Vehicle Off date cannot be prior to the Vehicle On date. Where the insurer is supplying the Vehicle Off Date, this field can be backdated to any date in the past, provided that the insurer covered the policy during that time and can be future dated anytime between the current date and the policy Expiry Date. Where the policyholder is supplying the Vehicle Off Date, this field can be backdated up to 14 days from the current date, and can be future dated to any date between the current date and the policy Expiry Date.
E074	INVALID REPORT INDICATOR ON POLICY RECORD	<p>This field indicates the frequency for which non-activity reports are to be produced for that policy. The period of non-activity will be measured from when the policy is first loaded to the database. That is, the date the policy was loaded and not the policy Effective Start Date. Must have one of the following values:</p> <p>X – Do not report this policy on any non-activity report for the insurer 0 – Default to standard report frequency, as detailed in Section 2.2 points 4, 5 and 6, of the Main Document</p> <p>1 – Report this policy after 1 month of non-activity</p> <p>3 – Report this policy after 3 months of non-activity</p> <p>6 – Report this policy after 6 months of non-activity</p>
E075	UPDATE TYPE OF VEHICLE RECORD NOT N, A, D or O	<p>The update type for this record has not been recognised. The valid update types are as follows:</p> <p>N – New A – Amend D – D-Delete O – O-Delete</p>

E076	UPDATE TYPE ON POLICY RECORD IS A AND EXISTING RECORD NOT FOUND	The record that you have submitted an amendment for could not be found on Navigate. This may indicate that the original record was not accepted.
E077	UPDATE TYPE ON VEHICLE RECORD IS A AND EXISTING RECORD NOT FOUND	The record that you have submitted an amendment for could not be found on Navigate. This may indicate that the original record was not accepted.
E078	UPDATE TYPE ON POLICY RECORD IS N AND EXISTING RECORD FOUND	The update submitted on the record is "N" for new but an existing overlapping version of the record has been found on Navigate.
E079	UPDATE TYPE ON VEHICLE RECORD IS N AND EXISTING RECORD FOUND	The update submitted on the record is "N" for new but an existing version of the record has been found on Navigate.
E080	NO MATCHING POLICY RECORD FOUND FOR DELETE	The record submitted has attempted to Delete a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted.
E081	NO MATCHING VEHICLE RECORD FOUND FOR DELETE	The record submitted has attempted to Delete a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted.
E082	INVALID RENEWAL INDICATOR ON POLICY RECORD	<p>This field indicates the insurer's renewal option for this policy. The field must be populated with one of the following options:</p> <p>2A – Insurer submits policies and vehicles in anticipation of them renewing</p> <p>2B – Insurer submits policies in anticipation of renewal, and Navigate renews the vehicles</p> <p>3A – Insurer submits policies and vehicles when renewal has been confirmed</p>

		3B – Insurer submits policies when renewal has been confirmed, and Navigate renews the vehicles
E083	INVALID POLICY ACCESS ON POLICY RECORD	This policy would have been set up with an access code, this error may have been produced as this access code is not correctly set up against the user's user access in the security section of user admin. This is a numeric field so this error will also be generated if the Policy Access code submitted differs from this format.
E084	FILE CONTAINS PHASE I AND PHASE II RECORD FORMATS	Phase 1 and Phase 2 records may not be submitted in the same file they must be submitted separately. The error indicates that a Phase 1 record is present in a Phase 2 file and vice versa.
E085	FILE CONTAINS UNKNOWN RECORD TYPE	The first character of each record indicates the record type. The valid record types are as follows: H – Phase 1 Header Record B – Phase 2 Header Record T – Phase 1 Trailer Record Z – Phase 2 Trailer Record P – Phase 1 Policy Record F – Phase 2 Policy Record E – Phase 1 Short Form Record V – Phase 2 Vehicle Record
E086	LAST RECORD IN FILE NOT RECORD TYPE Z	This error indicates that the correct Trailer record could not be found in the Phase 2 file submitted. This maybe because the last record in the file is not a Trailer record or that the trailer record does not have the record type "Z".
E087	INVALID POLICY RECORD TYPE	Policy records need to begin with the following value for either Phase 1 or Phase 2: P – Phase 1 Policy Record

		<p>F – Phase 2 Policy Record</p> <p>It may be because the record does not start with the relevant value that this error has been produced.</p>
E088	<p>NO POLICY RECORD FOUND FOR VEHICLE</p>	<p>This error states that the policy that the vehicle record was submitted for could not be found on Navigate. This may indicate that the corresponding policy record has not been submitted or accepted, or that the wrong policy number was used, or that the DA ID was omitted by a policyholder.</p>
E089	<p>VEHICLE ON/OFF DATES NOT WITHIN POLICY EFFECTIVE/EXPIRY DATES</p>	<p>The On/Off dates of vehicles must be within the policy's effective/expiry dates. This error indicates that On/Off dates submitted fall outside of the policy effective/expiry dates.</p>
E090	<p>POLICY NOT FOUND FOR CANCELLATION/LAPSE</p>	<p>The record submitted has attempted to Cancel/Lapse a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted.</p>
E091	<p>USER DOES NOT HAVE ACCESS TO THIS POLICY</p>	<p>This error will be reported if a user is trying to update a policy that they do not have access to. If the user should have access to this policy check their user access in the security part of the Update Vehicle website. Their user access should include either their policy number(s) or a relevant access code.</p>
E093	<p>UPDATE TYPE OF POLICY RECORD NOT N, A, D OR R</p>	<p>The update type is the second character of each record. The valid update types are as follows:</p> <p>N – New A -Amend D – Delete R – Renewal for Policy Record</p>
E095	<p>POLICYHOLDER CANNOT DELETE OR AMEND THIS VEHICLE AS IT HAS</p>	<p>This vehicle is on Navigate with Driver or Class Of Use details at vehicle level. Policyholders do not have the authority to amend records that have Class of Use, Permitted Driver, Number of Named Drivers etc at vehicle level.</p>

	DRIVER DATA	
E096	INVALID EFFECTIVE DATE FOR RENEWAL	When a policy is renewed the effective date of the renewal must be equal to, or after the expiry of the previous record. This date must also be in the format CCYYMMDD, for example 20041231
E097	RENEWAL POLICY RECORD REJECTED FOR THIS VEHICLE	This error will be produced for each subsequent vehicle in that file if the corresponding policy renewal record has been rejected due to an error.
E098	DA BRANCH ID PRESENT BUT NO DA ID	Data has been supplied in the DA Branch field so Navigate will require a DA ID also to be supplied but this data is missing.
E099	VEHICLE OFF DATE IS PRIOR TO ON DATE	The Vehicle Off date cannot be before the vehicle On date.
E100	POLICYHOLDER CANNOT SET FOREIGN REGISTRATION INDICATOR	This error indicates that a policyholder has submitted records with the Foreign Registration Indicator set to "F".
E102	UPDATE TYPE ON POLICY RECORD = "R" AND EXISTING RECORD NOT FOUND	A renewal record has been submitted but the existing record cannot be found on Navigate.
E103	USER ID NOT AUTHORISED	This error indicates that the user supplying the update does not have authority do so for this policy. This may be caused if the user has not been given access in the security section of Update Vehicle.
E107	REINSTATEMENT FOR A POLICY THAT IS NOT CANCELLED	The policy that this reinstatement record has been submitted for has not been cancelled. This may indicate that the original cancellation record was not accepted.

E108	REINSTATEMENT DATE EARLIER THAN CANCELLATION DATE	When a policy is being reinstated the reinstatement date cannot be prior to the date that the policy was cancelled, this error indicates that this is the case.
E110	RENEWAL WITH TYPE 2A OR 3A BUT NO VEHICLE RECORDS FOLLOWING	The renewal option indicated in the policy record is 2A or 3A, with these options the vehicles records must be submitted along with the policy renewal record. This error indicates that while the policy record has been received it has not been followed by the corresponding vehicles records.
E111	THE PREVIOUS VERSION OF THE POLICY IS CANCELLED AND IS NOT RE-INSTATED	This error will be produced if an amendment is submitted for a policy that has been cancelled but not yet reinstated.
E112	NO MATCHING VEHICLE RECORD FOUND FOR O-DELETE	The record submitted has attempted to Delete a record that has not been found on Navigate. This may indicate that the original record or an amendment was not accepted, or that the dates of the record are not equal to the dates on the record to be deleted.
E115	FUTURE DATED RENEWAL ALREADY EXISTS FOR THIS POLICY	This error will be produced if a renewal record has been submitted for a policy that already has a renewal pending.
E116	GAP IN COVER NOT PERMITTED WITH POLICY RENEWAL OR AMEND	When a policy is renewed or amended the effective date of the renewal/amendment must allow for the cover period to be continuous.
E118	UNAUTHORISED INSURER ID FOR SUPPLIER	This error will be produced if a policy is submitted for an insurer that the supplier is not authorised to supply on behalf of.
E119	NO POLICY IN FORCE ON THE CANCELLATION DATE	This error will be produced if a policy is not in force on the cancellation date.
E123	ESTIMATED FLEET SIZE MUST BE SPACES OR NUMERIC	Error produced if anything other than space of numeric characters value is produced

W001	VEHICLE REGISTRATION MARK NOT FOUND	The Vehicle Registration submitted could not be found on the UK Vehicle Data Ltd database. In rare cases this may be due to an error on the DVLA register but is more likely to suggest an error in the VRM.
W003	VEHICLE MAKE AND MODEL AND INSTEP CODE PRESENT	This warning is notification that both the vehicle make and model and instep code are present. In cases such as these the instep code will be used.
W004	INVALID EFFECTIVE START TIME	This warning will have been produced if the field is not completed in a 24-hour clock format or is not totally numeric.
W005	INVALID TIME OF EXPIRY	This warning will have been produced if the field is not completed in a 24-hour clock format or is not totally numeric.
W006	INVALID POLICYHOLDER DATE OF BIRTH	This date must be in the format CCYYMMDD, for example 20231230. If the date is not known, or the policyholder has been identified as a company by setting the Company indicator to C, this should be set to all zeroes.
W007	INVALID POLICYHOLDER AGE	This warning maybe produced if the field has been completed with anything other than numeric characters.
W008	NAMED DRIVER DATE OF BIRTH INVALID	This date must be in the format CCYYMMDD, for example 20231230. If the date is not known this should be set to all zeroes.
W009	NAMED DRIVER AGE INVALID	This warning maybe produced if the field has been completed with anything other than numeric characters.
W010	VEHICLE REGISTRATION MARK SHOWN AS EXPORTED	This warning is currently suppressed and should not be received.
W011	UPDATE TYPE IS D AND EXISTING RECORD NOT FOUND	This warning will be produced if a delete record is submitted for a policy that does not exist.

W012	UPDATE TYPE IS D AND EXISTING VEHICLE NOT FOUND	This warning will be produced if a delete record is submitted for a vehicle that does not exist.
W013	POLICY RECORD REJECTED AND PPCC NOT ACTIONED	The policy record in question was rejected and due to this the Party Policy Control Count indicated on the record submitted has not taken effect.
W015	VEHICLE NOT FOUND/SCRAPPED/EXPORTED BUT TRADE PLATE INDICATOR SET	Where the Trade Plate Indicator has been set to "T" this warning message will be generated to say that the VRM has generated a UKVD warning but state that the VRM was submitted as a Trade Plate.
W016	INVALID VEHICLE RECORD INDICATOR	This warning may indicate that the vehicle record indicator in the policy record has a value other than "Y" for Yes or a space.
W017	VEHICLE RECORD INDICATOR = Y, BUT NO VEHICLE RECORDS FOLLOWING	The vehicle record indicator on the policy record has set to "Y" to indicate that there will be corresponding vehicle records following this policy record but none were found.
W018	RENEWAL TYPE 2A OR 3A BUT NO VEHICLE RECORDS FOLLOWING	The renewal option indicated in the policy record is 2A or 3A, with these options the vehicles records must be submitted along with the policy renewal record. This warning indicates that while the policy record has been received it has not been followed by the corresponding vehicles records.
W020	THERE IS A LATER DATED VERSION OF THIS POLICY	This Phase 2 only warning is issued if the user sends in an Amendment to a current policy but Navigate has previously received a Future Dated version which is waiting to be actioned. This is warning the user that Navigate will apply this Amend to the current version of the policy but when the Future dated policy becomes effective, the policy details will revert back to those on the Future dated Policy record.
W021	VEHICLE REGISTRATION MARK NOT FOUND, DELAYED CHECK FOR NEW VEHICLE	This warning has been generated from a previous submission and has delayed because the VRM format has identified the vehicle being new. Delayed Vehicle Data Check results will take at least six weeks to be reported back. This alone will not cause the record to

		reject but it suggests a problem with the vehicle or VRM which should always be checked with the DVLA.
W022	VEHICLE REGISTRATION MARK SHOWN AS SCRAPPED	This information has been retrieved from the UK Vehicle Data Ltd database. This alone will not cause the record to reject but it suggests a problem with the vehicle or VRM which should always be checked with the DVLA.
W023	POLICYHOLDER HAS SUPPLIED A FIELD THAT ONLY THE INSURER CAN POPULATE	The Policyholder has submitted a file with fields completed that only the insurer is authorised to do so. These fields include Class of Use, Permitted Driver, Number of Named Drivers etc at vehicle level.
W024	VEHICLE REGISTRATION MARK SHOWN AS SCRAPPED, DELAYED CHECK FOR NEW VEHICLE	This information has been retrieved from the UK Vehicle Data Ltd database. This warning has been generated from a previous submission and has been delayed, delayed Vehicle Data Check results may take up to six weeks to be reported back, as the vehicle registration has been identified as new. This alone will not cause the record to reject and is meant very much as a warning, which if causes suspicion/concern should always be confirmed with the DVLA.
W028	VEHICLE REG SHOWN AS SCRAPPED, DELAYED CHECK NEW VEHICLE FROM POLICYHOLDER	This information has been retrieved from the UK Vehicle Data Ltd database. This warning has been generated from a previous submission by a policyholder and has been delayed because the VRM format has identified the vehicle being new. Delayed Vehicle Data Check results will take at least six weeks to be reported back. This alone will not cause the record to reject but it suggests a problem with the vehicle or VRM which should be taken up with the policyholder.
W030	VEHICLE REG NOT FOUND, DELAYED CHECK NEW VEHICLE FROM POLICYHOLDER	This information has been retrieved from the UK Vehicle Data Ltd database. This warning has been generated from a previous submission by a policyholder and has been delayed because the VRM format has identified the vehicle being new. Delayed Vehicle Data Check results will take at least six weeks to be reported back. This alone will not cause the

		record to reject but it suggests a problem with the vehicle or VRM which should be taken up with the policyholder.
W031	EMPTY FILE RECEIVED	This warning has been produced as the file received contained no data.
W032	A RECORD LIES WHOLLY BEYOND AMEND PERIOD	This warning is to advise the user that they have truncated an existing record, but there is another existing record (cover period) that has been unaffected by the truncation.
W033	ON AND OFF DATES FOR O DELETE RECORD CAN NO LONGER BE FOUND	In circumstances where a truncating Amend and an O-Delete are submitted in the same file in that order, and the O-Delete fails to find an existing record that matches its On- and Off-dates because the truncating Amend changed the Off-date of the existing record, the O-Delete will not be applied.
W034	MOTOR TRADE IND = M OR F BUT FLEET SIZE ESTIMATE IS MORE THAN ZERO	Error will occur if Motor Trade Policy Indicator is set to M or F, but estimated Fleet Size Indicator is more than zero.
W040	THE LAST 3 ALPHAS SHOULD NOT INCLUDE I OR Q	Registrations since Sep 2001 should not include I or Q in any of the last three characters. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.
W041	THE FIRST ALPHA MUST NOT BE O OR U	For registration numbers where the Prefix denotes year of registration, the first Alpha must not be O or U. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.
W042	THE FIRST NUMERIC MUST NOT BE	For all types of registration number, the first Numeric must not be zero. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do

	ZERO	this interactively using Update Vehicle), and the correct details submitted.
W043	THE LAST 3 ALPHAS SHOULD NOT INCLUDE I, Q OR Z	For registration numbers where the Prefix denotes year of registration, the last 3 Alphas should not include I, Q or Z. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.
W044	THE FIRST 3 ALPHAS SHOULD NOT INCLUDE I, Q OR Z	For registration numbers where the Suffix denotes year of registration, the first three Alphas must not include I, Q or Z. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.
W045	THE LAST ALPHA MUST NOT BE Q	For registration numbers where the Suffix denotes year of registration, the last Alpha should not be Q. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.
W046	THE LETTER Q SHOULD NOT BE INCLUDED ANYWHERE WITHIN THE FORMAT	For Dateless/ Ageless Registrations, the letter Q should not be included anywhere within the format. Please check that the correct VRM was submitted. If the VRM is incorrect, then the vehicle should be completely deleted (it is easier to do this interactively using Update Vehicle), and the correct details submitted.