



# Southern Africa Short Term Program Activity and Implementation Report

(PAIR Report)

*July 2015*

ACORD is a non-profit membership standards development organization (SDO) which develops and maintains forms and data standards and provides professional and technical support to the global insurance industry.

This Program Activity Guide is prepared to regularly inform ACORD members and other interested parties on the standards development efforts underway in a non-technical manner. This publication is produced quarterly with the first quarter introducing the priorities for the year, the mid-year reports providing status and the year-end reporting a summary of accomplishments.

Any and all comments and questions are appreciated. Please contact either the standards

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## Introduction

### Purpose of this Report

This guide provides regular quarterly updates to all standards participants and interested parties regarding the current activities, issues and accomplishments in the ACORD Australia/New Zealand General insurance Program Standards Program.

### The ACORD Southern Africa Short Term Program (SAST)

The ACORD SA ST Program was established in 2011 to provide insurance process, messaging and data standards for the Southern Africa Short Term Insurance marketplace (aka commercial property & casualty).

The scope of the standards includes all short term insurance products for the Southern Africa Region (countries such as South Africa, Botswana, Namibia, Zimbabwe, Zambia, etc.) including personal lines (motor, property, liability, accident, etc.) and commercial lines (motor, property, liability, accident, etc.).

It focuses on the entire insurance value chain from product design, quotation, sale, policy issuance, in-force policy activity and through to benefit and claim management. It involves all constituencies in the life insurance community including agents & brokers, distributors, insurers, service providers, software providers, and regulators.

The Program manages one data standard; the ACORD Messaging Library (AML).

For more information and resources be sure to check out the SAST Community page on the [ACORD website](#)

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[ACORD Standards and Steering Committee Members](#)  
[Public Program Information](#)  
[Public Standards Site](#)  
[ACORD Governance Documents](#)

### What's New in the ACORD Southern Africa Short Term Program

The second quarter for this program consisted mainly of working on implementations to coincide with version 2.2.1.

We are also pleased to announce two new members to the program, Lion of Africa and Standard Bank.

## Working Group Scorecard

### Categories & Definitions

- **Overall Performance** – Objectives are being met, Group is meeting regularly, with representative attendance/participation, defined objectives are being achieved and on schedule.
- **Timeline & Deliverables Process**– the objectives defined by the WG are on schedule
- **Attendance & Membership Commitment** - Group is meeting regularly, with representative attendance,
- **Objectives / Needs being met** – Defined objectives and progress is being made by the Working Group.
- **Contribution from Members** – Working Group members are providing the appropriate level of input for the groups.

### Status Indicators & Definitions

- ▲ **Good** – Group is on target for the specific category
- ▶ **Warning** – Group is aware the performance is jeopardizing the success of the working group's goals and is correcting the issue.
- ▼ **Critical** – performance is not being met by this Group.
- ◀ **On Hold** – Future direction is being determined.

2 <sup>nd</sup> Quarter Performance	Scope of Work	On Schedule	Attendance	Member Contribution	Implementation Commitment
Program Working Group	▲	▲	▲	▲	▲

## Working Groups

The driving force of standards maintenance is our working groups made up of industry volunteers who spend valuable time understanding gaps & issues and developing the optimum solutions for each within the standards.

*Visit the [Southern Africa Short Term Community site](#) and “FOLLOW” working group [at this link!](#)*

Click on the Working Group Name (below) to access all details specific to that working group. Including:

- Meeting Minutes
- Work In Progress
- Shared Documents
- Active Participants
- Meeting Calendar

The Southern Africa Short Term Program (SAST) Working Groups are listed below in alphabetic order:

### **Program Working Group**

#### *Latest Status (updated July 2015)*

This quarter was spent working on the Business Process Guide to ensure it reflects the most current processes in the region.

Work continues on real time messages as well as premium bordereaux messages.

STRIDE has also sent out an RFP to enhance the switch. The group and ACORD are eagerly awaiting the results of the RFP.

This is the primary working group for the program. All day-to-day maintenance requests and standard development work is done by this group. All participants in the SA ST Program are encouraged to participate.

The current main focus of the group is validation of the business messages included in phase one of the STRIDE initiative. The progress continues at a rapid pace and is on target for delivery in the third quarter of 2012.

The group has begun focusing on business rules to be applied as a secondary validation (after schema validation) to ensure that the messages are "business valid". Rules are being put into place that, while ensuring the message is valid, will also not place too big of a burden on the brokers when sending the policy information to the insurers.

The working group has also been looking at the next set of messages to be designed. On the list is first notice of loss, engineering, contractors, etc. The Steering Committee will be validating and prioritizing that list.

**Meeting Frequency:** This working group meets weekly at 3:00 PM South Africa time

#### **Schedule & Objectives**

- The Steering Committee has identified the following priorities for the working group for 2015:
  - Commercial Lines enhancements
  - Bordereaux enhancement

#### **Implementation and Advocacy**

- The only reported implementations are the Policy Synchronization message from Santam, Mutual and Federal and Auto and General.

## Objectives 2015

The 2015 SAST Goals and Objectives are listed in the following table.

<b><i>SAST 2015 GOALS REPORT</i></b>					
<i>Goals</i>	<i>Focus Areas</i>	<i>Objectives</i>	<i>Expected Outcome</i>	<i>Actionable Steps</i>	<i>Result</i>
<b>Build Awareness and Expertise of Standards</b>	Encourage the creation of experts that can guide carriers and solution providers toward the optimal use of ACORD transactions	Cultivate new A.C.E.s	Increase in number of A.C.E.s	Contribute to education program and documentation / training material publication efforts	
<b>Refine and Enhance Communication</b>	Better understand the needs of our entire user community	Leverage relationships with ACORD and industry organizations as SAIA, STRIDE, FIA, vendors	Initiatives aligned with industry needs	Monitor organizations for issues that may be addressed by this program	

## ***SAST 2015 GOALS REPORT***

<i>Goals</i>	<i>Focus Areas</i>	<i>Objectives</i>	<i>Expected Outcome</i>	<i>Actionable Steps</i>	<i>Result</i>
		Publicize important issues and program progress through ACORD media, keeping our membership up to date with current information	Recognition of ACORD's responsiveness and agility in evolving standards to meet business needs	Publish relevant, emerging news in ACORD Newsletter	
<b>Refine and Enhance Standards</b>	Enhance the personal lines standard with additional requirements as needed as the standard gets more widely implemented	Release interim and final standards as determined by the market.	STRIDE Switch continues to process messages.	Continue to work with the industry to ensure the standard and the business rules are relevant.	
	Commercial Lines	Work with members to ensure Commercial lines	Release interim and final standards as	Continue to work with the industry to ensure the standard and	



## ***SAST 2015 GOALS REPORT***

<i>Goals</i>	<i>Focus Areas</i>	<i>Objectives</i>	<i>Expected Outcome</i>	<i>Actionable Steps</i>	<i>Result</i>
		data is available in AML.	determined by the market.	the business rules are relevant.	
	Claims Messages	Work with insurers to have the Claims messages (synch, inquiry and registration) ready for processing.	Release interim and final standards as determined by the market.	Continue to work with the industry to ensure the standard and the business rules are relevant.	
<b>Refine and Enhance SDO Processes</b>	Support and promote the adoption and use of tools that enhance the ability to develop and utilize ACORD standards	SDO Process Repository	List of processes (internal and external) illustrating steps followed in producing standards	Contribute process information to PWG Community page	
	Ensure working groups employ		Communities focused on	Continue using issue list for WG	

## ***SAST 2015 GOALS REPORT***

<i>Goals</i>	<i>Focus Areas</i>	<i>Objectives</i>	<i>Expected Outcome</i>	<i>Actionable Steps</i>	<i>Result</i>
	the most efficient use of member / ACORD time and resources. Working groups are listed in the Program Activity Report.	Dynamic steering committee engagement	understanding business problems rather than simply “adding elements to a standard”	agendas, minutes, MR review, Plenary, ballot, and continuing education	
			Engagement and involvement of ACORD architectural staff in standards evolution process	Ensure the architectural staff is engaged in working group calls and also work offline to validate design decisions.	

## Communities and Industry Associations

ACORD's mission includes aid and support of implementers. This is accomplished through "Communities." These communities may be created as standards (SDO) efforts or they may be created independently by members and/or non-members, together seeking to solve one or more business problems. The activities of these groups may result in traditional L&A Program working group efforts, or may be educational or advocacy communities. ACORD staff and resources are a vital component of these communities.

ACORD Communities focus on specific issues and opportunities. They set goals to support standards usage, initiatives and promote consistency of implementation.

Industry Associations may also host communities that ACORD participates on to assist with implementation and development of ACORD Forms, Data Standards and the ACORD Reference Architecture (Framework).

Key to the relationship between ACORD Communities and Associations is advocacy and promotion of consistent and successful use of ACORD forms, standards and reference architecture.

<b>Sponsor / Community</b>	<b>Key Objectives and Activities</b>
FIA	FIA provides input to the Steering Committee (from the broker point of view) to ensure we are meeting the needs of the brokers.
SAIA	SAIA provides input to the Steering Committee (from the insurer point of view) to ensure we are meeting the needs of the insurers.
Southern Africa Short Term Implementation Community	This community <a href="https://www.acord.org/Community/ZA/ZASTIC/default.aspx">https://www.acord.org/Community/ZA/ZASTIC/default.aspx</a> has been created to allow discussion of the ACORD Southern Africa Short Term XML standard and the implementation of such using the STRIDE switch.
STRIDE	STRIDE provides input to the Steering Committee to ensure that we are meeting the needs of the short term industry.