



OneShield Market Solutions: Policy Management

Embrace innovation, lower costs and reduce IT complexity through process automation of your Policy Management lifecycle

OneShield Software's Policy Management solution allows you to leverage an integrated cloud-hosted and rules-based application to automate and streamline every stage of the policy lifecycle.

OneShield's As-A-Service software solutions are designed to automate business workflows and process highly customized policy and claims systems. Most importantly, our tools are compatible with existing legacy systems and custom-built to meet the specific needs of insurers.

At OneShield Software, we're technology experts with deep roots in the insurance industry. Our comprehensive portfolio of highly configurable, cloud-hosted business applications are tailored for insurance industry leaders looking to reduce expenses, improve efficiencies, and optimize service delivery every step of the way.

Adaptable, integrated and secure, OneShield's Policy Management solution puts an end to rising IT costs and anxiety and leaves you with more time to focus on business priorities like customer service, growth and innovation.

"As-A-Service" (AAS)?

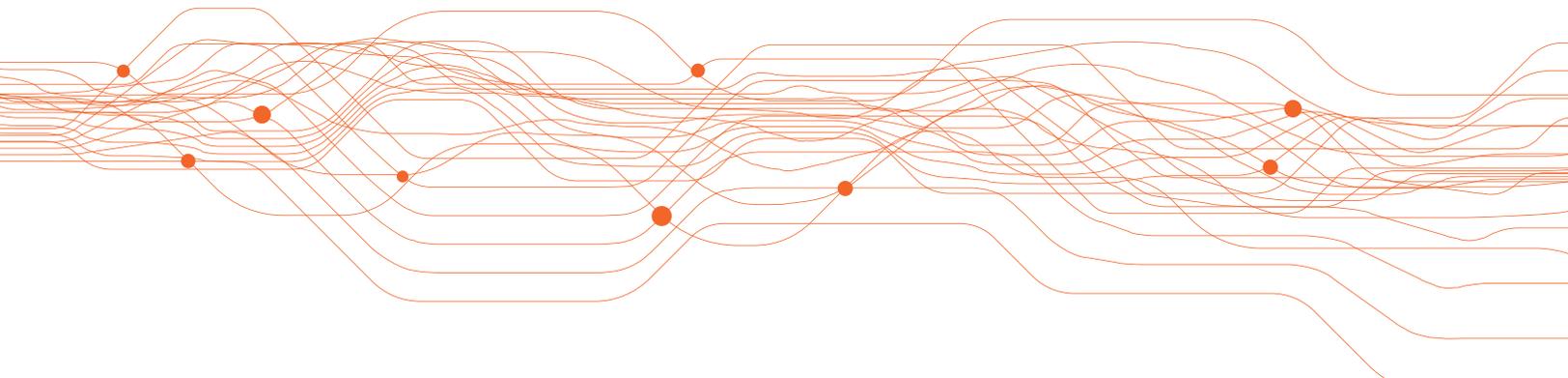
Looking to add organizational agility, operational efficiencies, unlimited scalability, collaborative access, and flexibility to your business?

Consider cloud-based "As-A-Service" technology: out-of-the-box integration frameworks and functionality, unlimited scalability, workflow automation, disaster recovery and failover protection, 24/7 technical support, and data security.

Working in the cloud with OneShield Software allows your business to be nimble, efficient and cost-effective — eliminating manual-based operations, enhancing speed-to-market, enriching analytics, and improving your bottom line.

AAS is why 95% of IT spending is expected to shift from in-house to the cloud by 2025, why 4 out of 5 carriers want to digitize core insurance operations, and why 66% of insurers are moving to the cloud to reduce overall cost of process delivery¹.

¹ Source: HFS Research November 2015



Key Core System Features



General Features

- **Customer Center** provide a 360-degree view of existing and prospective accounts, brokers, vendors, insurers, carriers and representatives.
- **Task Management**, including one-time and recurring diary entries with automated escalation, system and user-created notes, correspondence generation from templates, and embedded email integration
- **User Administration and Configuration Control Panel** with standard integration to third party applications, including financial and general ledger systems.
- **User Dashboard**, provides a complete snapshot of appointments, daily activities, critical alerts and open workflow steps. Users also have quick access to all open applications, submissions and policy records and direct access to action items, contacts, reports, financials, search and administration.



Component Highlights

- Work multiple submissions and active files in real-time with producers, insureds and third parties for quoting, binding, issuing and servicing all transactions within the lifecycle of a policy.
- With shared and common product definition data, you can access default rates and tables based on specific states or NCCI, or use your own specific rates, rules and workflows.
- Define and manage your own underwriting rules, as well as any type of actionable outcome, including straight-through processing via a robust table-driven engine.
- Create custom billing plans and generation of invoices and track cash management for premiums, dues, taxes, fees and other collection items.
- Leverage standard output for reporting financial transactions to Accounting or General Ledger systems.
- Automate renewals and audits.
- Benefit from fully-integrated document management, including acquisition, generation and organization.



Other Key Features

- **Policy Submission Management** is contained within a single workflow, guiding your user through a process that records the data needed for rating and quoting.
- **Web Portal** capabilities for agents to enter prospective account's exposures, coverages, deductible and limit information for an immediate quote.
- **Underwriting and Carrier Clearance** information collected in the submission process is systematically evaluated by the rules engine to define underwriting processing or transmission to the carrier for review and acceptance. Automated tracking of carrier processing and clearance is maintained as part of the workflow.
- **Flexible Quoting** features allow agents to receive quick and full quotes along with binding within the agent portal and generate a standard proposal. The system also allows underwriters to select the most appropriate program.
- **Standard and Configurable Policy Administration.** Once bound, the system performs re-rating, changes in exposures, and resulting billing plans, financial transaction management, and renewals and cancellation management.



Reporting and Analytics

OneShield's feature-rich reporting module provides dashboards and a wide variety of standardized reports. The reporting module fully supports configuration of all management, financial, operational, statistical and marketing reports. It also has the ability to generate regulatory reporting as required by a customer or governing body.



Billing & Accounting Features

- **Integrated Billing** module uses a configuration process to create and maintain billing plans that match the components of your policy premium.
- Depending on your arrangement, **the system allows defining invoicing for broker-billed options** and transactions such as dues, fees and miscellaneous items.
- **Full accounting support** is provided, allowing the system to create billing and invoice transactions that can be interfaced to any third party accounting system.



System Requirements

OneShield's cloud-based environment means technology requirements are simple. A secure URL and login algorithm gives users easy access, based on a security profile that defaults to their rights and privileges within the system.

OneShield's cloud platform is hosted in an SSAE-16 Type II certified data center, delivering 24/7/365 availability along with the peace of mind that your data is safe and secure. The hosted platform removes the expense of server hardware, supporting and maintaining networks, and database software.

Ready to Simplify Your Business? It Starts with a Conversation.

OneShield Software delivers core business software solutions to the global insurance and broader financial services industry, deployed in the cloud or on premise. Our portfolio of standalone, subscription, and cloud-based software products includes enterprise class policy management, billing, claims, rating, product configuration, business intelligence, and analytics solutions that leverage a tool-based open architecture and single data model platform to streamline your business. OneShield Software automates and simplifies the complexities of core systems with targeted solutions, seamless upgrades, collaborative implementations, and lower total cost of ownership.

With corporate headquarters in Marlborough, MA and offices in India, Canada, and Australia, OneShield, Inc. has a total of 46 products in production across the P&C and Life insurance markets.

Visit us at OneShield.com or contact us now to learn how we can help simplify and transform your business.

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