2023-04-07 Meeting Agenda

Date

07 Apr 2023

peter antley

Susan Chudwick

Nathan Southern

Brian Mills

Justin Cimino

Ken Sayers

Mason Wagoner

Greg Williams

Lanaya Nelson

Ash Naik

Allen Thompson

Jenny Tornquist

Jeff Braswell

Patti Norton-Gatto

Attendees

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openIDL

This is a weekly series for The Regulatory Reporting Data Model Working Group. The RRDMWG is a collaborative group of insurers, regulators and other insurance industry innovators dedicated to the development of data models that will support regulatory reporting through an openIDL node. The data models to be developed will reflect a greater synchronization of data for insurer statistical and financial data and a consistent methodology that insurers and regulators can leverage to modernize the

data reporting environment. The models developed will be reported to the Regulatory Reporting Steering Committee for approval for publication as an open-source data model.

openIDL Community is inviting you to a scheduled Zoom meeting.

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Minutes

I. Agenda

A. Classification Codes - Assigned Risks - Stat Plan (Personal Auto Data Standard Draft) - worked way up through p. 37

1. Positions 104-109 do not explicitly say that they are commercial auto, but when Peter looks at the different classifications they are using, they reflect this line
2. Peter will therefore delete the commercial content from classification codes - set about deleting multiple pages
3. He also deleted Michigan (21) from Exception Code A - these are all commercial. Also deleted New York (31) taxicabs and public library - also commercial.
4. Private Passenger Non-Fleet Retained
5. Penalty Points/Surcharge (108-9) Retained
6. Assigned Risk Coding - Auto Stat Plan-Extended Discussion

B. Discussion of SDMA Uploading in EBCDIC Format - Peter asked if this is an older relic that should be removed. Group: revised date in the lower right corner means it should still be there. (Peter agreed with this as a rule of thumb). Point raised that openIDL needs to be able to receive both ASCII and EBCDIC formats.

C. Discussion of Acceptable File Formats - raised by Peter - txt zip and pgp, but for mvp for this application, what file types should be supported? Zip files a necessity or only text files? (result of this question inconclusive in meeting).

D. Statistical Data Management Application Basics - Section 2. Peter highlighted this section, because it describes how to work with the SDMA. Highlighted it, for now, because it needs to be addressed, but until loading application is set up, it will be difficult to write the instructions for it.

Peter noted that he will clean up the document and then have Tornquist go through it, then post next week on the wiki.

Noted that functionally we will be closer to the GT2 but functionality will be much closer to the SDMA

E. Project Roadmap

1. Imperative for running openIDL: a way to submit data, run editing packages, inform in-line editing, and submit to the HDS so that it is ready for reporting.
2. Mason and Peter developed a project roadmap in 8 phases:
    a. Phase 1: Gathering Current Functionality (This is ongoing right now - in April applies to both the SDMA and GT2 (identifying gaps and issues)
        i. Carrier input (likes, dislikes, needs, wants, etc.)
        ii. Login
        iii. Landing Page - login, and can see a list of all the submitted files, so base of operations
        iv. Upload Data
        v. Run Validations in an Event Driven Way
        vi. Editing of Single Records and Bulk Updates
        vii. Run Validations Again - Make sure it's under error threshold
        viii. Submission of data - which will move data from staging in the upload application into the actual HDS so it can be used in reporting, pending approval of extraction pattern
    b. Phase 2: Identifying Gaps/Issues
    c. Phase 3: Solution Discussion
    d. Phase 4: Pixel Perfect Mockups (clear sense of what we're going to build)

   e. Phase 5: PoC API/Database
   f. Phase 6: PoC UI/UX React
   g. Phase 7: Production Migration Plan
   h. Phase 8: Production/Deployment
3. Application Requirements
   a. Login
   b. Upload P&C Insurance (Local-OLGA) openIDL Loading Graphical Applications
   c. Running Validations (Edit Package)
   d. Review Validation Errors
   e. Review Records
   f. In-Line Record Updating
   g. Bulk Record Updating
   h. Submit P&C data OLGA-HDS.
4. Questions
   a. Susan: Do we have the capability when we review the validations - are there reports we will review and download if we need to, into our own space? Peter: yes, would like to set up/explore customizable workflows.

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Discussion items

Time	Item	Who	Notes

Action items

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