

ECLIPTIC



GEMINI

Global Expert Management Initiative

User Guide - Expert

User Manual Guide

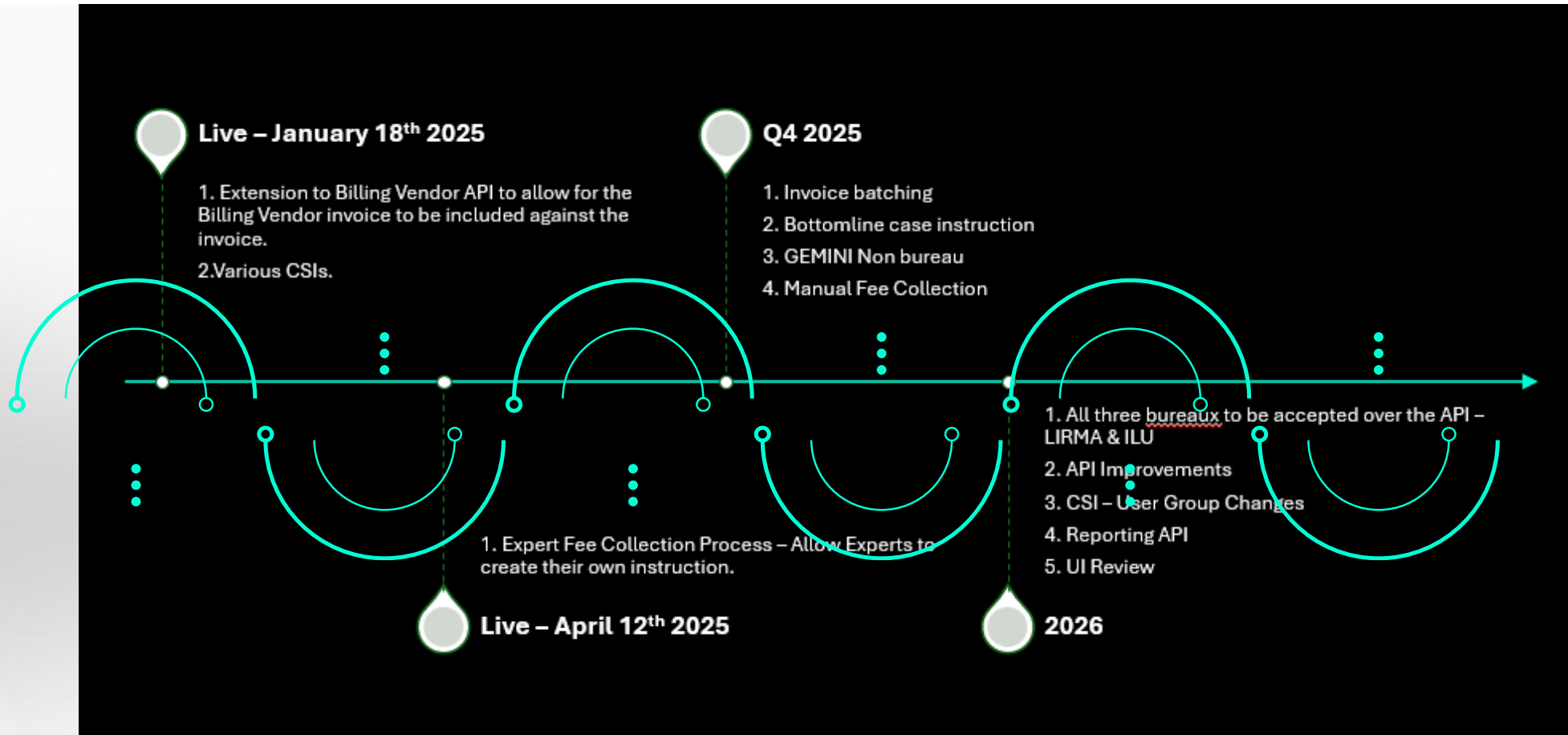
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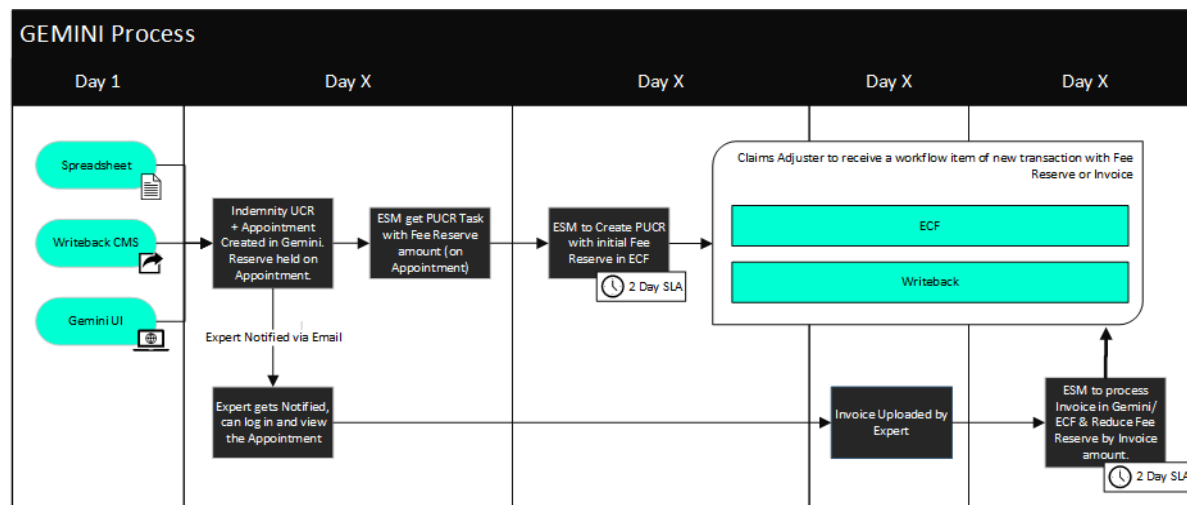
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1 General Information

1.1 What does the GEMINI system cover?



1.2 The GEMINI Process



2 Accessing GEMINI

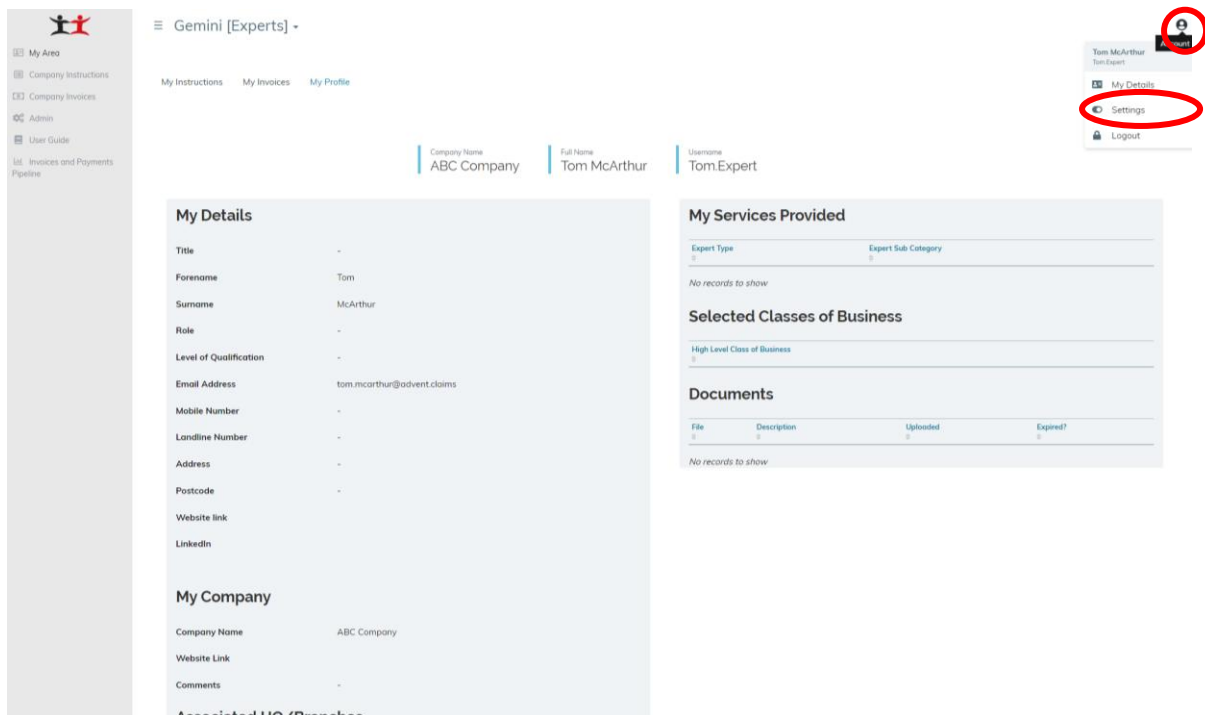
2.1 Logging On

A user ID and password is required to log into the GEMINI interface which will be made available via your admin user. Two automated emails will be sent to each user when set up in GEMINI. The first email will show their username and the next will show their password. Upon first log in the user will be required to change their password. If the user has not logged in for 25 days then a reminder will be sent. However accounts will still be made inactive if no activity for 30 days.

Please note: if you have been added as a Registered User then you will NOT receive any login credentials.

2.2 Changing password

Select icon in top right-hand corner -> Select 'Settings'.



Change password to preferred choice which must include 1 capital, 1 number & 1 punctuation. The user will also have the option to change their accessibility options to suit their preferences.

Please note: you will have to select and save your 'Accessibility options' before entering in your new password. The system will not save your change of password if you select the save button within the 'Accessibility options' area.

Change password

Current password *

New password *

Confirm password *

Security question

Please select your security question *

What was your childhood nickname? ▼

Security answer *

safe

Save

Accessibility options

☐ Use contrasting colours

☐ Use colour-blindness palette

☐ Show persistent banner notifications

☐ Force charts to display as tabular data

Save

Accessibility support

For more detailed guidance on how to increase accessibility and change how your device or web browser works, we recommend the following websites:

Windows
For information about accessibility options using a Windows PC:
[Windows Accessibility features](#)

Apple
For information about accessibility options using an Apple:
[Apple accessibility for OSX](#)

On an iPhone or iPad
For information about accessibility options using an iPhone:
[Apple accessibility for ios](#)

On an Android device
For information about accessibility options using an Android device:
[Android accessibility help centre](#)

2.3 Unlocking a user

A user can lock their account by entering in the incorrect password three times. The admin user can unlock their account by going into the applicable users credentials. Select 'Admin' -> 'User Admin' -> 'Credentials'.

Admin

User Admin

Expert Users - ABC Company

Filter by Search ▼

Full Name	Email Address	Branch name(s)	Admin?					
Tom McArthur	tom.mcarthur@advent-claims	No Branches set	✓	Edit User	Credentials	View/Edit Assigned Branches	Make Inactive	Delete

Update their 'Lock status' to 'Unlocked' and then click 'Save'. Once you have clicked 'Save' the user will be sent a confirmation email that their account is unlocked followed by a second email with their new password.

Edit Credentials

Username *

Tom Expert

User role *

Lock status *

Unlocked

Save

2.4 Exit system

To exit the system, select top right icon -> Select 'Logout'.

The screenshot shows the Gemini [Experts] user interface. On the left is a sidebar with navigation links: My Area, Company Instructions, Company Invoices, Admin, User Guide, and Invoices and Payments Pipeline. The main header area includes a hamburger menu, the text 'Gemini [Experts] -', and tabs for 'My Instructions', 'My Invoices', and 'My Profile'. Below the header, there are three columns: 'Company Name' (ABC Company), 'Full Name' (Tom McArthur), and 'Username' (Tom.Expert). The main content area is divided into two panels. The left panel, titled 'My Details', contains a form with fields for Title, Forename (Tom), Surname (McArthur), Role, Level of Qualification, Email Address (tom.mcarthur@advent.claims), Mobile Number, Landline Number, Address, Postcode, Website link, and LinkedIn. Below this is the 'My Company' section with fields for Company Name (ABC Company), Website Link, and Comments. The right panel, titled 'My Services Provided', has a table for Expert Type and Expert Sub Category, followed by 'Selected Classes of Business' and 'Documents' sections, all showing 'No records to show'. In the top right corner, a profile dropdown menu is open, showing the user's name and a 'Logout' button, which is circled in red.

2.5 Multi-factor Authentication

To enable Multi-Factor Authentication (MFA), select the top right icon -> Select "My 2FA Setup".

The screenshot shows the Gemini [Experts] user interface for a different user. The sidebar is the same. The main header area includes a hamburger menu, the text 'Gemini [Experts] -', and tabs for 'My Instructions', 'My Invoices', and 'My Profile'. Below the header, there are three columns: 'Company Name' (Test Expert Company 101), 'Full Name' (Clive Gallehawk), and 'Username' (Clive.Expert). The main content area is divided into two panels. The left panel, titled 'My Details', contains a form with fields for Title, Forename (Clive), Surname (Gallehawk), Role, Level of Qualification, Email Address (clive.gallehawk@ecliptic.t), Mobile Number (376757647646), and Landline Number. Below this is the 'My Company' section with fields for Company Name, Website Link, and Comments. The right panel, titled 'My Services Provided', has a table for Expert Type and Expert Sub Category, followed by 'Selected Classes of Business' and 'Documents' sections, all showing 'No records to show'. In the top right corner, a profile dropdown menu is open, showing the user's name and a 'My 2FA Setup' button, which is circled in red.

From this page, click the toggle above the QR code to enable MFA and follow the instructions on screen. Please note that whilst most authenticator applications which use a QR code should work, not all applications are guaranteed to be compatible. It is therefore

recommended to use either the Microsoft or Google authenticator apps.

Set up Two Factor Authentication

Two Factor Authentication (2FA) adds a higher level of security to your account by using a second device - usually your phone - to verify that you are the correct user.

Authenticator App



1. Open your app

If you don't have an authenticator app, they can be downloaded from your app store

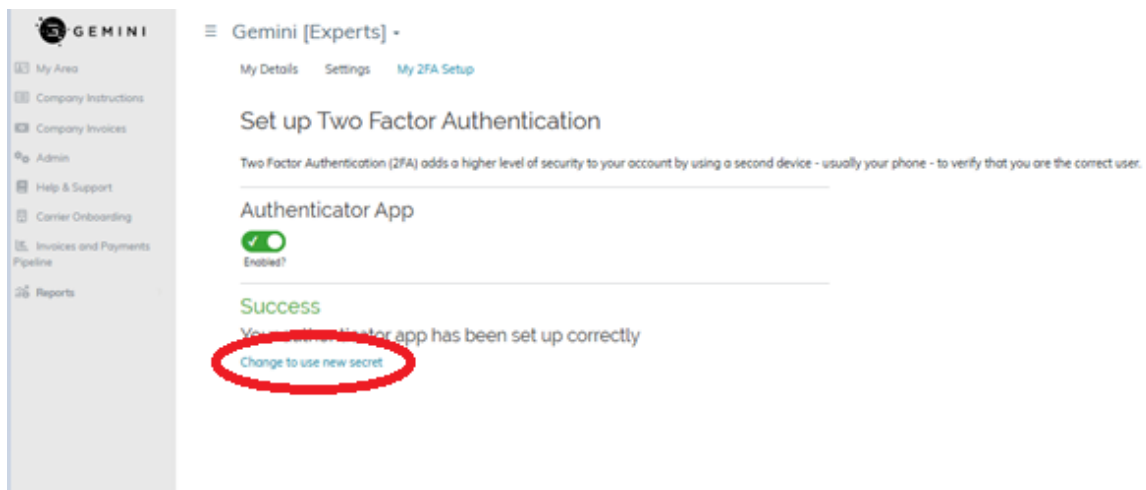
2. Add a new account

Use the plus (+) or Add Account button in the app, and select the QR code option to scan the code shown above

3. Verify setup

Enter the 6-digit code from the app below

If you need to access a new code for any reason, for example, if you lose access to your original authenticator device, you can click the highlighted “Change to use new secret” to provide a new QR code, which can be scanned on your new device.



If you lose access to your 2FA code whilst you are logged out, or your account gets locked due to too many failed 2FA entries, you can contact the GEMINI Helpdesk for assistance – GEMINIHelpdesk@ecliptic.tech.

3 Light Touch, Fully Registered & Tab Summary

3.1 Light touch vs Fully Registered

When registered, your company will be stored as a light touch registered Expert within the system but will have the opportunity to complete your company profile to become fully registered.

Light touch Expert - You will only be required to include your company name, website, company logo and any additional comments. You will still have functionality to upload invoices into the system and process your fees. Your company will NOT be searchable by any registered Carrier companies.

Fully registered Expert – If you choose to complete your full registration this will mean you can complete your company profile within the system which will consist of showing you classes of business, services and location covered. All these fields will be searchable by all Carriers that are registered within the system. You will be required to complete a set of due diligence questions as shown in section 6.5.

3.2 My Area (Light touch & Fully Registered)

When an Expert user logs into GEMINI, they will be presented with 'My Profile'. The user can edit their own profile to show all market users what services they can provide as well as classes of business and the locations they cover.

The Expert user will have access to all their own instructions and to upload their own invoices which they have been appointed on. If requested by the Carrier, the user will be able to add documents and tasks to this instruction which will be shown for the Carrier who is working on the claim.

3.3 Company Instructions – admin user only (Light touch & Fully Registered)

The Expert admin user will have access to see all instructions allocated to the Expert company and allocate an unassigned instruction to an Expert within their organisation.

3.4 Company Invoices – admin user only (Light touch & Fully Registered)

The Expert admin user will have access to see all their company invoices that have been previously uploaded into GEMINI.

3.5 Admin – admin user only

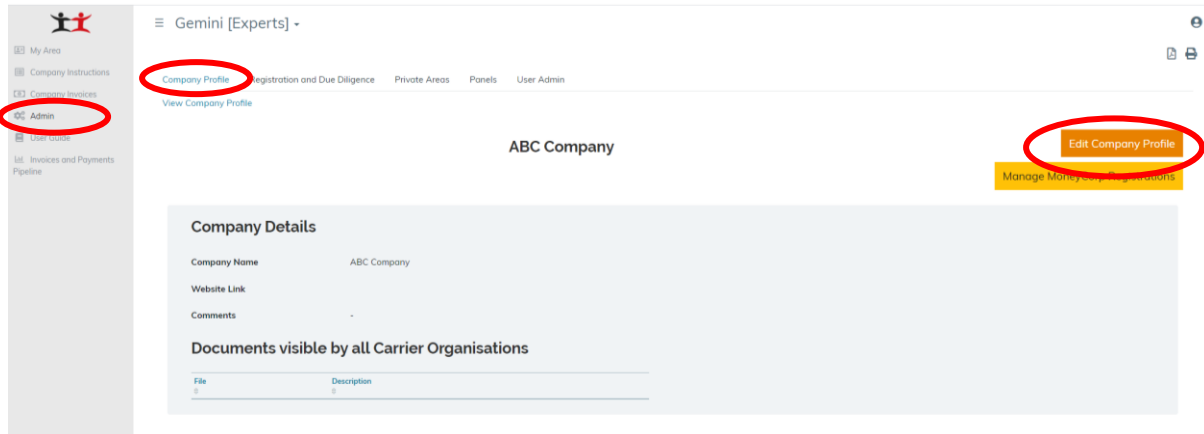
This tab allows admin users to have visibility of all users within their company, and make changes to their permissions and access:

- User details – to update the user's name, email phone number
- Credentials – to update the user's username, and the ability to unlock a user who has locked their account
- Active/Inactive status – to restrict a user's access to the system
- Edit their company profile (Fully Registered Experts only)
- Edit their company's due diligence
- View all panels their company has been allocated on
- Have access to all private areas

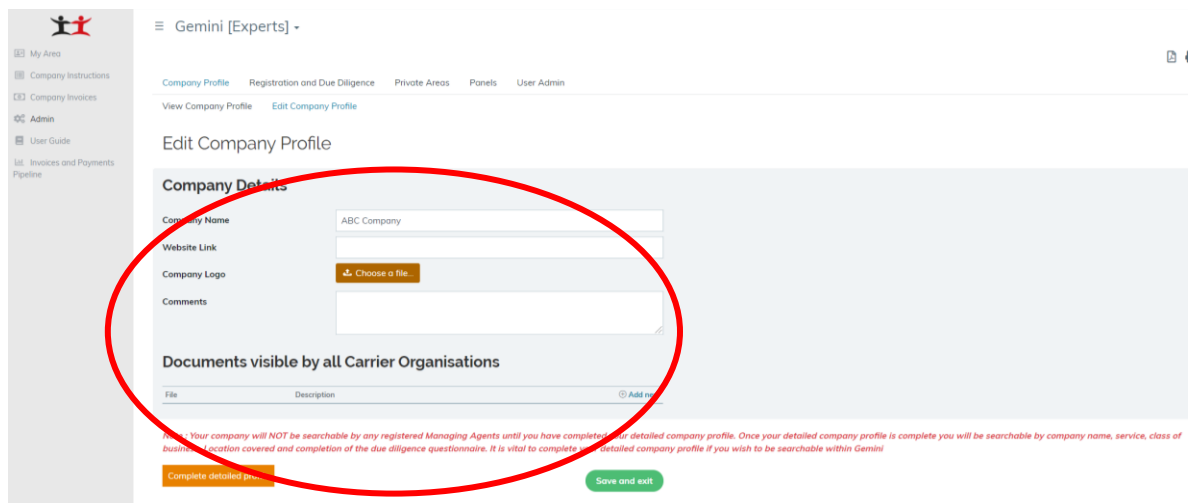
4 Company/Personal Set Up & Due Diligence

4.1 How to complete your Light Touch details (Expert admin user only)

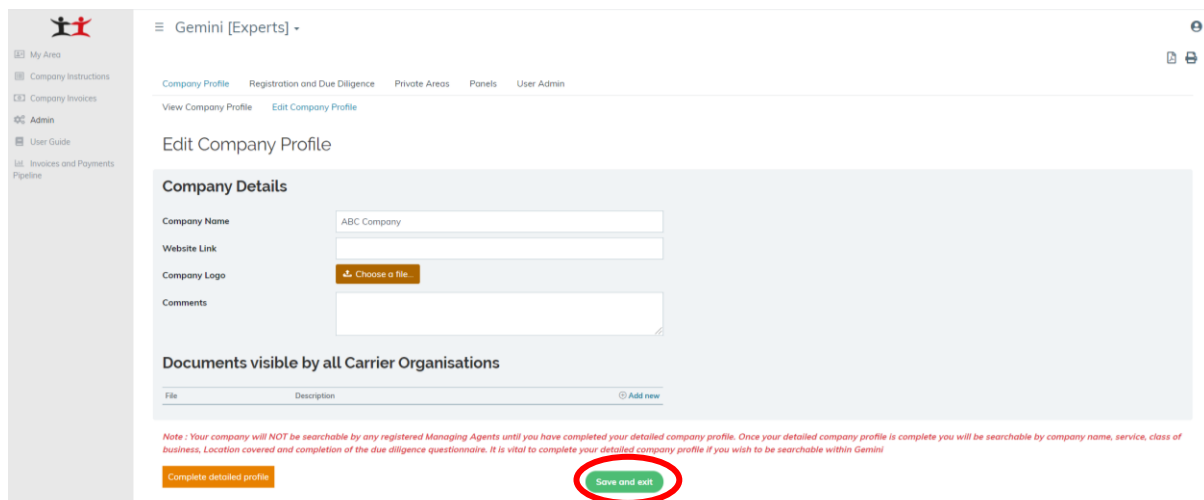
Select into 'Admin' -> 'Company Profile' -> 'Edit Company Profile'



Once you select into 'Edit Company Profile' you will have the option to edit your company name, add a website link, logo, comments and any supporting documents.



Once complete select 'Save and Exit'.



4.1 How to complete your Full company profile (Expert admin user only)

Please Note: Your company profile will be seen by all Carriers registered on the system including any documents which are attached to your company profile.

To become a fully registered Expert please select 'Complete detailed Profile'.

The screenshot shows the 'Edit Company Profile' page. The left sidebar contains navigation links: My Area, Company Instructions, Company Invoices, Admin, User Guide, and Invoices and Payments Pipeline. The main content area has tabs for Company Profile, Registration and Due Diligence, Private Areas, Panels, and User Admin. The 'Company Profile' tab is active, showing 'View Company Profile' and 'Edit Company Profile' links. The 'Edit Company Profile' section includes 'Company Details' with input fields for Company Name (ABC Company), Website Link, Company Logo (with a 'Choose a file...' button), and Comments. Below this is a 'Documents visible by all Carrier Organisations' section with a table with columns 'File' and 'Description', and an 'Add new' button. A red circle highlights the 'Complete detailed profile' button at the bottom left. A green 'Save and exit' button is at the bottom right. A note at the bottom states: 'Note: Your company will NOT be searchable by any registered Managing Agents until you have completed your detailed company profile. Once your detailed company profile is complete you will be searchable by company name, service, class of business, Location covered and completion of the due diligence questionnaire. It is vital to complete your detailed company profile if you wish to be searchable within Gemini'.

The Expert admin user will then be able to:

- (1) Edit & add company details which includes web address, company address, documents and locations your company cover by country & city.
- (2) add & remove services the company provides
- (3) add & remove the classes of business the Expert organisation covers.

(2) Select from the drop for the service your company provides

The screenshot shows the 'Edit Company Profile' page with the 'Services Provided' dropdown menu open. The dropdown menu is highlighted with a red circle. The services listed are: Please select..., Please select..., Accounting, Engineer, Forensic Accountant, Legal, Medical, Other, Subrogation Agent, Surveyor, and TPA/CH. The 'Save and exit' button is visible at the bottom right.

Once you have selected your service, you will then have the options of the sub types. Please select the box that is relevant to you.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Edit Company Profile Company HQ/Branches

Edit Company Profile

Company Details

Company Name: ABC Company

Website Link:

Company Logo: [Choose a file](#)

Comments:

Locations Covered

[Location Setup](#)

Services Provided

Adjusting: [ALL](#) [NONE](#)

Select: ☒ 1st Party ☒ 3rd Party

Classes of Business

Select: [ALL](#) [NONE](#)

☐ Accident & Health

☐ Aviation

☐ Casualty FirePro

☐ Casualty Other

☐ Casualty Treaty

☐ Energy

☐ Marine

☐ Property (D&F)

☐ Property Treaty

☐ Specialty Other

Documents visible by all Carrier Organisations

File	Description
Add new	

Once you are happy with your profile page click 'Save and exit' which will save your changes.

(3) To add you classes of business, select from the fields provided

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Edit Company Profile Company HQ/Branches

Edit Company Profile

Company Details

Company Name: ABC Company

Website Link:

Company Logo: [Choose a file](#)

Comments:

Locations Covered

[Location Setup](#)

Services Provided

Adjusting: [ALL](#) [NONE](#)

Select: ☒ 1st Party ☒ 3rd Party

Classes of Business

Select: [ALL](#) [NONE](#)

☐ Accident & Health

☐ Aviation

☒ Casualty FirePro

☒ Casualty Other

☐ Casualty Treaty

☐ Energy

☐ Marine

☒ Property (D&F)

☐ Property Treaty

☐ Specialty Other

Documents visible by all Carrier Organisations

File	Description
Add new	

Once you have added all company details, select 'Save and exit'.

4.2 How to add locations to your company (Expert admin user only)

Select into 'Edit Company Profile'.

The screenshot shows the 'ABC Company' profile page. The left sidebar contains navigation links: My Area, Company Instructions, Company Invoices, Admin, User Guide, and Invoices and Payments Pipeline. The main content area has tabs for Company Profile, Registration and Due Diligence, Private Areas, Panels, and User Admin. The 'Company Profile' tab is active, showing 'View Company Profile' and 'Company HQ/Branches' options. The profile details include:

- Company Details:** Company Name (ABC Company), Website Link, and Comments.
- Documents visible by all Carrier Organisations:** A table with columns for File and Description.
- Locations Covered:** A table with columns for Country/Territory and City.
- HQs & Branches:** A table with columns for City and Name.
- Services Provided:** A table with columns for Expert Type and Expert Sub Category.
- Classes of Business:** A table with columns for High Level Class of Business, Property (D&F), Casualty FinPro, and Casualty Other.

The 'Edit Company Profile' button is circled in red in the top right corner.

Then select 'Location Setup'.

The screenshot shows the 'Edit Company Profile' page. The left sidebar is the same as the previous screenshot. The main content area has tabs for Company Profile, Registration and Due Diligence, Private Areas, Panels, and User Admin. The 'Company Profile' tab is active, showing 'View Company Profile', 'Edit Company Profile', and 'Company HQ/Branches' options. The 'Edit Company Profile' sub-tab is selected. The profile details include:

- Company Details:** Company Name (ABC Company), Website Link, Company Logo (Choose a file), and Comments.
- Documents visible by all Carrier Organisations:** A table with columns for File and Description, and an 'Add new' button.
- Locations Covered:** A button labeled 'Location Setup' is circled in red.
- Services Provided:** A dropdown menu with 'Please select...' and a 'Use filters first' button.
- Classes of Business:** A section with 'Select ALL NONE' and a list of checkboxes for Accident & Health, Aviation, Casualty FinPro, Casualty Other, Casualty Treaty, Energy, Marine, Property (D&F), Property Treaty, and Specialty Other.

A 'Save and exit' button is located at the bottom center.

You will then have a three-step process in order to select the cities you cover.

Please note: you will have the option to select 'All' or 'None' at the top of each section. If you do select 'All' this will auto submit the section apart from the 'Region' section.

The screenshot shows the 'Location Setup' page. The left sidebar is the same as the previous screenshots. The main content area has tabs for Company Profile, Company Location(s), Registration and Due Diligence, Private Areas, Panels, and User Admin. The 'Company Location(s)' tab is active, showing 'Location Setup' and 'Branch Setup' options. The 'Location Setup' sub-tab is selected. The page includes:

- Region Selection:** A section with 'Select ALL NONE' and a list of checkboxes for Africa, Americas, Asia, Europe, and Oceania.
- City Selection:** A section with 'Select ALL NONE' and a dropdown menu with 'Please select...' and a 'Use filters first' button.
- Submit Buttons:** Two 'Submit' buttons are located at the bottom of the region and city selection sections.

A 'Back to profile' button is located in the top right corner.

1. Select the regions you cover and then select 'Submit'

Select: **ALL** NONE

☐ Africa

☒ Americas

☐ Asia

☒ Europe

☒ Oceania

Submit

2. The second drop down will then show all regions previously selected. Once you select from a region within the drop down the system will show all countries within that region to select from. Select your individual countries by clicking the tick box or select 'All'.

all none

Please select...

Americas

Europe

Oceania

all none

Europe

Select: **ALL** NONE

☐ Albania

☐ Andorra

☐ Austria

☐ Belarus

☐ Belgium

☐ Bosnia and Herzegovina

☐ Bulgaria

☐ Croatia

☐ Czech Republic

☐ Denmark

☐ Estonia

☐ Faroe Islands

☐ Finland

☐ France

☐ Germany

☐ Gibraltar

☐ Greece

☐ Guernsey

☐ Holy See

☐ Hungary

☐ Iceland

☐ Ireland

☐ Isle of Man

☐ Italy

☐ Jersey

☐ Latvia

☐ Liechtenstein

☐ Lithuania

3. The third drop down will then show all countries previously selected. Once you select a country within the drop down the system will show all cities within that country to select from. Select your individual cities by clicking the tick box or by select 'All'.

all none

Please select...

Americas - Anguilla

Americas - Antigua and Barbuda

Americas - Argentina

Americas - Aruba

Americas - Bahamas

Americas - Barbados

Americas - Belize

Americas - Bermuda

Americas - Bolivia

Americas - Bouvet Island

Americas - Brazil

Americas - Canada

Americas - Cayman Islands

Americas - Chile

Americas - Colombia

Americas - Costa Rica

Americas - Cuba

Americas - Dominica

Americas - Dominican Republic

Americas - Ecuador

Americas - El Salvador

Americas - Falkland Islands

Americas - French Guiana

Americas - Greenland

Americas - Grenada

Americas - Guadeloupe

Americas - Guatemala

Americas - Guyana

Americas - Haiti

☐ Lisburn

☐ Liverpool

☐ London

☐ Newcastle upon Tyne

☐ Newport

☐ Norwich

☐ Nottingham

☐ Oxford

☐ Perth

☐ Peterborough

☐ Plymouth

☐ Portsmouth

☐ Preston

☐ Reading

☐ Ruislip

☐ Rutland

☐ Salford

☐ Salisbury

☐ Sheffield

☐ Slidcup

☐ Southampton

☐ St Albans

☐ Stirling

☐ Stoke-on-Trent

☐ Sunderland

☐ Swansea

☐ Wakefield

☐ Winchester

☐ Wolverhampton

☐ York

Submit

Once you select submit this will save all selected cities to your profile. To complete the process you can navigate back to your company profile by selecting 'Back to profile'.

4.3 How to add a branch(s) to your company (Expert admin user only)

Please complete steps found within section 6.3 before adding your branches into the system. Once that has been completed you can add all company branches and add individual Experts to each separate location.

To add a company branch, select 'Admin' -> 'Company Profile' -> 'Company HQ/Branch' -> 'Add Branch'.

You will then see a list of all cities selected within section 6.3.

To create a branch use the search to tabs to filter for the city where your branch is located and then select 'Filter'.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Company HQ/Branches Branch Setup

Search Location Covered

Regions Europe

Country/Territory United Kingdom

Cities London

Filter Reset

Selected Cities

All	Continent	Country/Territory	City	Number of HQ/Branches
☐	Europe	United Kingdom	London	0

Apply To... Please Select... Submit

Select the tick box on the left hand side.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Company HQ/Branches Branch Setup

Search Location Covered

Regions Europe

Country/Territory United Kingdom

Cities London

Filter Reset

Selected Cities

All	Continent	Country/Territory	City	Number of HQ/Branches
☒	Europe	United Kingdom	London	0

Selected Records (1) Company Locations - Create Branches Submit

Select the option from the drop down for 'Company Locations – Create Branches'.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Company HQ/Branches Branch Setup

Search Location Covered

Regions Europe

Country/Territory United Kingdom

Cities London

Filter Reset

Selected Cities

All	Continent	Country/Territory	City	Number of HQ/Branches
☒	Europe	United Kingdom	London	0

Selected Records (1) Company Locations - Create Branches Submit

Once you select submit, the system will save your company's branch. You can see all selected branches by selecting back to 'Company HQ/Branches'

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile **Company HQ/Branches** Branch Setup

Search Location Covered

Regions: Europe

Country/Territory: United Kingdom

Cities: London

Filter Reset

Selected Cities

All	Continent	Country/Territory	City	Number of HQ/Branches
☐	Europe	United Kingdom	London	2

Apply To:

Submit

4.3.1 How to edit your company's branch(s) details (Expert admin user only)

Select into 'Company HQ/Branches' and then 'Edit' for the relevant branch

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile **Company HQ/Branches**

ABC Company Add Branch

HQ and Branches

HQ or Branch	Name	Experts (Click to View)	Date of Setup	Comments	City	Country/Territory	Address 1	Address 2	Postcode	
Branch	ABC Company - London	0	Wed, 03 Jun 2020	No Comments Set	London	United Kingdom	No Address 1 set	No Address 2 set	No Postcode	Edit Assign Expert(s) to Branch Delete

You will then be able to:

- Edit your branch details including the branch name
- Select your branch classes of business
- Select your branch services

You can copy your branch details over to your branch by selecting 'Copy from Company' within the top left hand corner.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Company HQ/Branches **Edit HQ/Branch**

Copy Settings from Company

Edit HQ/Branch

HQ or Branch: Branch

Name: ABC Company - London

Country/Territory: United Kingdom

City: London

Address 1:

Address 2:

Postcode:

Comments:

Save

Locations Covered

Locations Setup

Selected Classes of Business

Select: ☒ ALL ☐ NONE

☐ Accident & Health

☐ Aviation

☐ Casualty FinPro

☐ Casualty Other

☐ Casualty Treaty

☐ Energy

☐ Marine

☐ Property (D&F)

☐ Property Treaty

☐ Specialty Other

Selected Service Provided

Please select:

Use filters first

4.4 Adding Users

Select 'Admin' -> 'User Admin' -> 'Add Expert to Company'.

Expert Users - [REDACTED]

[+ Add Expert to Company](#)

Filter by Search ^

Full Name

Role

HQ or Branch

[Submit](#) [Reset](#)

Full Name	Email Address	Branch name(s)	Admin?						
[REDACTED]	[REDACTED]	No Branches set	☒	Edit User	View/Edit Assigned Branches	Lock	Reset Password	Deactivate User	

Enter in the user's details and select whether you want them to be:

- Expert Admin: Access to their personal instructions, all company instructions, personal and company profile and can add and remove users in the system.
- Expert: Only will have access to their instructions and personal profile.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

User Admin [Add User](#)

User Details

Title

Forename *

Surname *

Email Address *

Mobile Number

IDD Code Mobile number

Landline Number

Comments

Select Company Branches

Company Branches [Add new](#)

Login Details

Username *

User role *

Password is automatically created on creation.

[Submit](#)

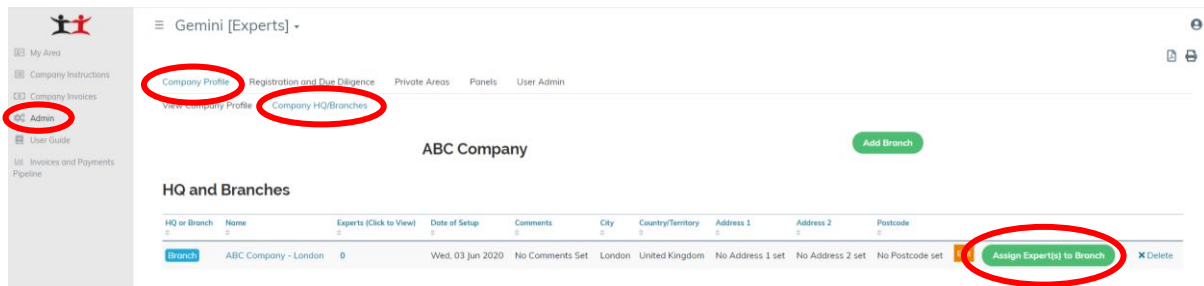
You can allocate this user to a branch within by selecting 'Add new' under the section 'Select Company Branches'

Once you have completed all mandatory fields click submit.

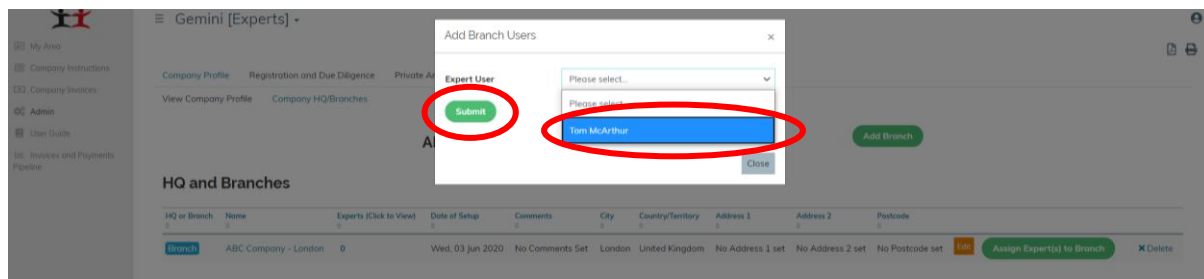
Please Note: An email will be sent out to any expert users who have not accessed their account within 25 days to remind them to log into their accounts.

4.5 How to assign users to a branch(s)

Select 'Admin' -> 'Company Profile' -> 'Company HQ/Branches' -> 'Assign Expert(s) to Branch'.



From the pop up, select 'Add new'. This will show a listing of all users previously added in section 6.6. From the listing select the user you wish to assign to this branch and select 'Save'.



4.6 Deactivating or locking/unlocking users

Expert Admins can deactivate users from their organisation. This will:

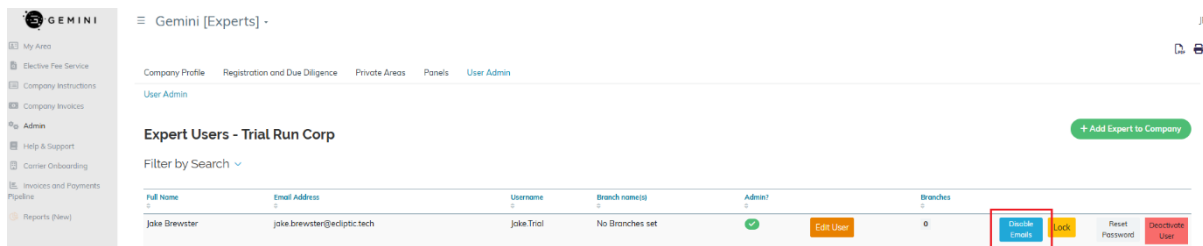
- Block that user's access to their GEMINI account.
- Delete all personal information associated with their account.

Expert Admins can also lock or unlock a user's GEMINI account. This prevents any access to that user's account but does not remove any of their details.

Full Name	Email Address	Branch name(s)	Admin?					
GEMINI GEMINI	gemini@gemini.tech	No Branches set		Edit User	View/Edit Assigned Branches	Lock	Reset Password	Deactivate User

4.7 How to disable notifications for unassigned instructions

If an instruction has no individual Expert user assigned, all Expert Admins for your company will receive an email notification whenever that instruction is created, closed or cancelled. Expert Admins can disable these notifications by navigating to 'Admin' > 'User Admin' > 'Disable Emails'.

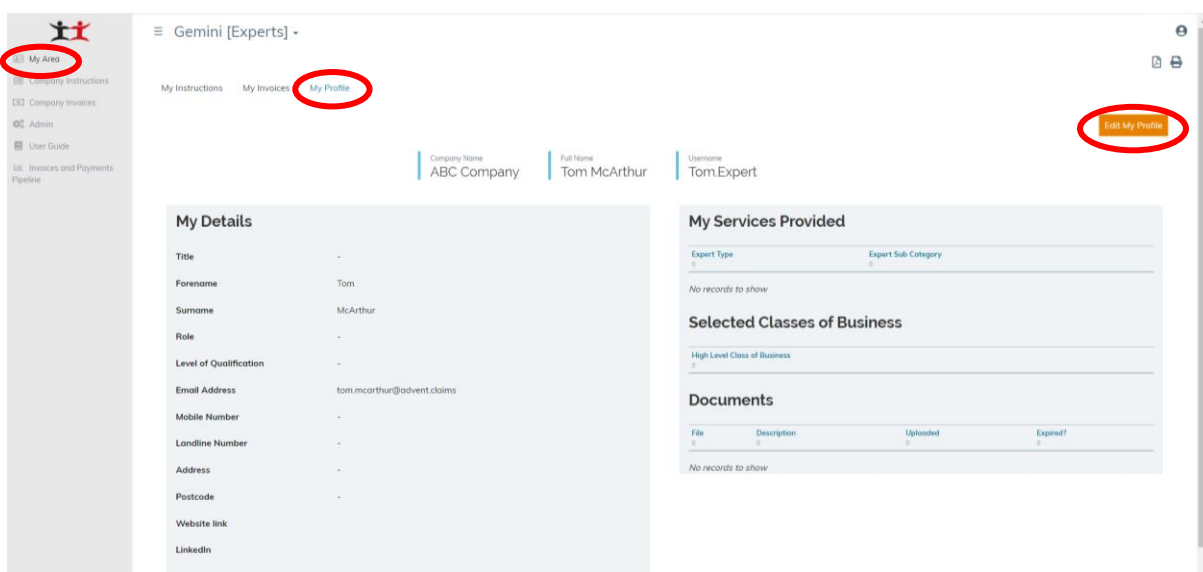


4.8 How to edit your personal Expert profile

Please note: This is your personal profile. Expert admin users will need to complete the company profile page as well as their personal profile.

Your personal profile can be edited to show the services you provide as an individual Expert as well as the classes of business and locations you cover. The Expert user can also add documents to their profile page. This page will be visible to the all Carriers registered in the system.

Select 'My Area' -> 'My Profile' -> 'Edit My Profile'.



Click 'Submit' to save changes to your profile page.

My Details

Title: Please select...

Forename: Tom

Surname: McArthur

Role:

Level of Qualification:

Email Address: tom.mcarthur@advent.claims

IDD Code: Please select...

Mobile Number:

Landline Number:

Address:

Postcode:

Website link:

LinkedIn:

Comments:

Photo: Choose a file...

Locations Covered

Location Setup

Set Services Provided

Selected Services Provided

Expert Type: Expert Sub Category:

No services selected

Set Classes of Business

Select: ALL NONE

Accident & Health

Aviation

Casualty FinPro

Casualty Other

Casualty Treaty

Energy

Marine

Property (D&F)

Property Treaty

Add the Countries that you cover as part of your Expert role. Please follow steps with 6.3

Please ensure you click the tick box to add your services and classes of business to your profile

Please note: You have to individually select each location you cover by both country and city.

4.9 Due Diligence (Expert admin user only)

Each Expert company is required to complete their due diligence which will be shared with the market. The due diligence has been made up of nine questions about your Expert company where you will be able to attach supporting notes and documents.

4.9.1 How to complete and submit your company due diligence

Select 'Admin' -> 'Registration and Due Diligence'.

Registration and Due Diligence

Due Diligence Overview

Due Diligence For (ABC Company)

Last Modified (Wed, 03 Jun 2020 07:03 am)

Full Name:

Are your company's Due Diligence details already in the LME database?

Please select...

Update

Due Diligence Status

Pending

The admin user must select whether their company's due diligence is already on the LME database. If your due diligence is on the LME database then you are not required to fill in the due diligence in the GEMINI system. The LME database is the TPA database managed by Charles Taylor. If your company's due diligence has been completed on the LME database, then the Carrier company will be shown a URL link once they have selected to view your due diligence. This link will direct them to the LME database.

Otherwise select 'No' and 'Update'. This will then drop down nine questions to complete. None of these questions are mandatory and you can submit your due diligence at any time. You can submit your due diligence by clicking 'Save & Submit' at the bottom of the page. Please ensure that you click the tick box 'By submitting this due diligence, you are attesting that the answers given and documents submitted are a full and fair disclosure, that may ultimately be validated by the market through audit. Once you tick to accept you will have the ability to submit your due diligence.

See link below for complete due diligence question set.



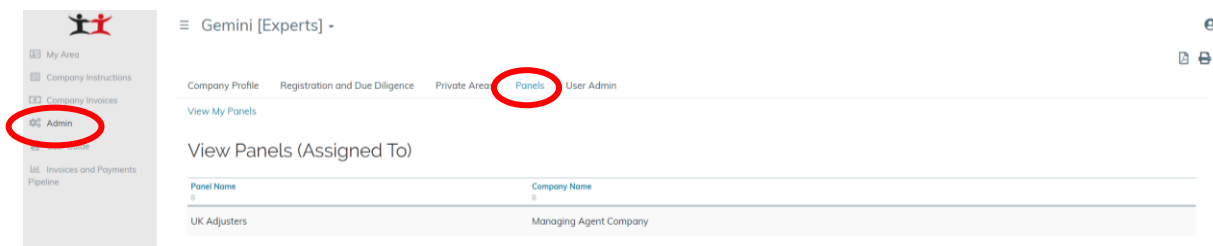
5 Panels & Private Areas (Expert admin user only)

5.1 Panel

A Carrier can select an Expert company onto a panel that the Carrier will create. The Expert admin user has access to see which Carriers panels they have been appointed to.

5.1.1 How to view which panels your Expert company has been appointed to

Select 'Admin' -> 'Panels'.



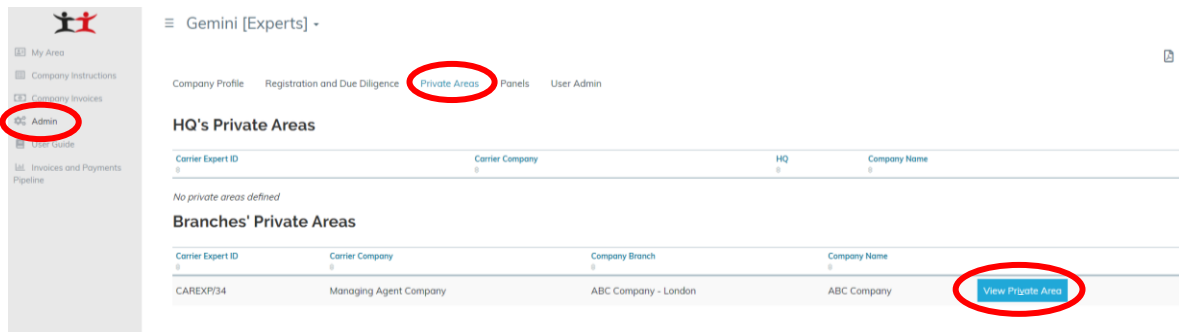
5.2 Private Areas

A Carrier can set up a private area between their organisation and your Expert company. This private area can only be seen by your Expert company and the Carrier company and is not visible to anyone else in the market.

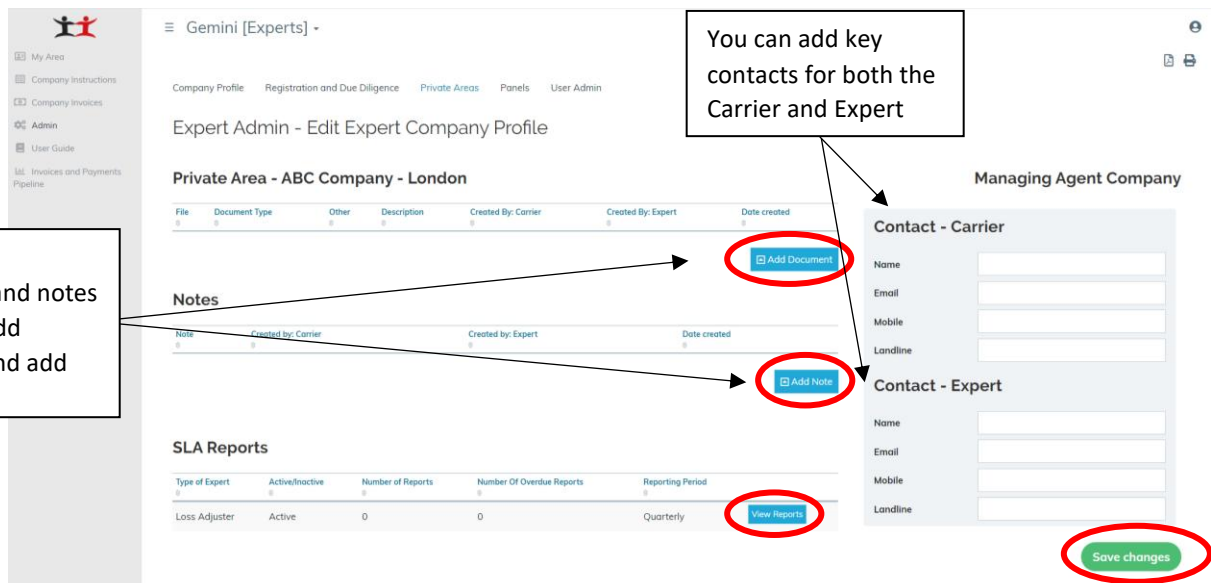
The Carrier must create the private area before the Expert will have access. This private area can be created for both the Expert HQ office and branch offices. This area can hold documents e.g. pricing, terms of engagement etc. and can also house an area for the completion of SLA performance information for Expert companies to complete on a monthly or quarterly basis.

5.2.1 How to view your private areas

Select 'Admin' -> 'Private Areas' -> then you can select into the private area by clicking 'View Private Area'.



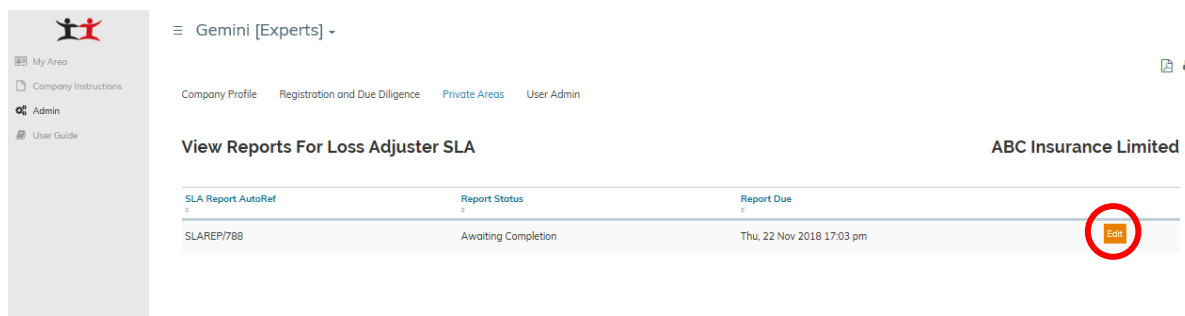
Once you enter your private area the Expert will be able to store documents, notes, key contacts, audit details and SLA reports. Please ensure you select 'Save' when you have added a new document, note & key contact.



SLA report criteria will be set by each Carrier and the key contact for the Expert company will be sent an email at the beginning of each reporting period (monthly/quarterly) to advise them to complete the report for the previous period. If you have not completed this report within the first 15 days then you will receive an email which will remind you to log into the system and complete the SLA report.

To view and edit SLA reports select 'View Reports' shown above.

After selecting 'View Reports' the user will be directed to the page showing all reports. To complete a report, click 'Edit'.



You will be asked to enter a result for each measure, together with the number of cases to which this measure relates. Once you have completed the report click 'Submit to Carrier'. Please ensure you click 'Save' before submitting the report. To view the SLA report for a loss adjuster and lawyer please open the documents shown below.



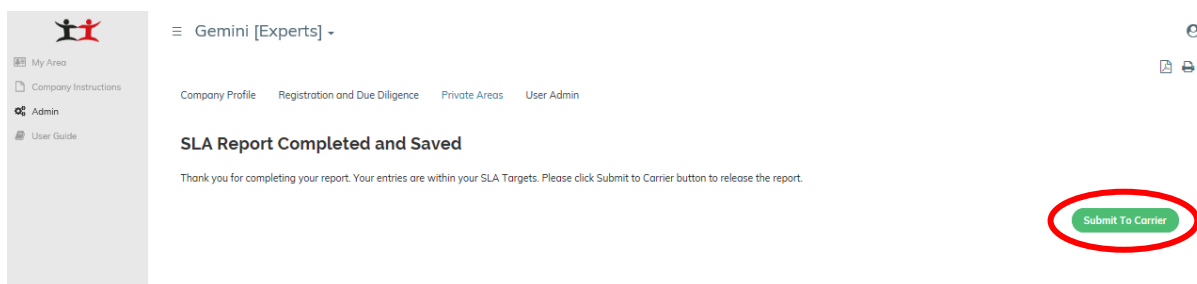
Lawyer SLA Report.docx



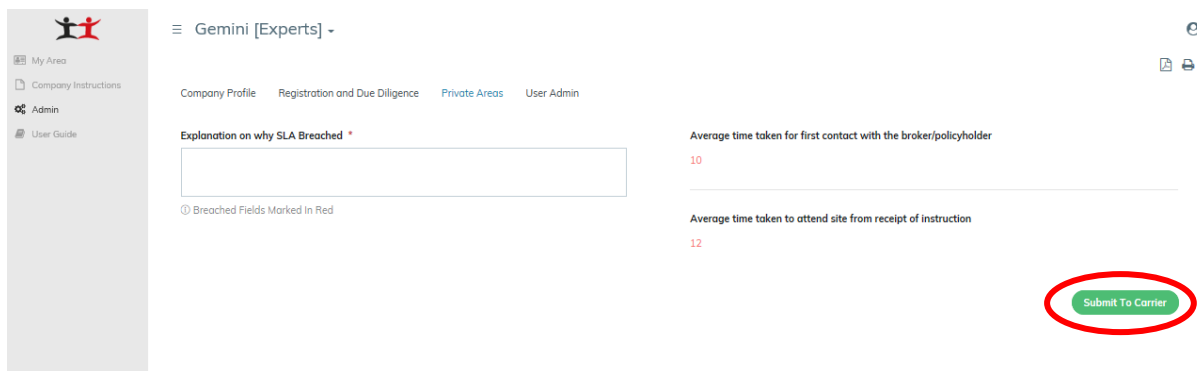
Loss Adjuster SLA Report.docx

Please note: All financials entered into the lawyer SLA report will be recorded in USD

Once you have selected 'Save' the system will either confirm your SLA report has been completed and allow you to submit the report to the Carrier. To do this click 'Submit To Carrier'.



Or if there is a breach of SLA the user will be required to give an explanation for this breach. Once you fill in the mandatory field, select 'Submit To Carrier'.



6 Moneycorp Registration

6.1 Moneycorp Registration within GEMINI

Moneycorp are a registered bank who have a worldwide presence with offices in the UK, Ireland, France, Spain, Romania, UAE, Hong Kong, Australia, USA, Brazil. Moneycorp will provide ECLIPTIC with a secure environment for you to capture your company's payment/bank details and process payments. ECLIPTIC will not have access to your details within the Moneycorp system and these will be held privately, only allowing access to your chosen Moneycorp users. You will only need to register your with Moneycorp once to save your company's bank details.

Please note: you will not have to create any bank accounts within the system but only register those you currently have.

For more information on Moneycorp please follow the link below.

<https://www.moneycorp.com/en-gb/about-us/>

6.1.1 Setting up your company details

To register your company please select 'Admin' -> 'Company Profile' -> 'Moneycorp Registration'

The screenshot shows the Gemini [Experts] dashboard. In the left sidebar, the 'Admin' link is circled in red. The top navigation bar shows 'Company Profile' as the selected tab, also circled in red. Below the navigation bar, the 'Manage MoneyCorp Registrations' button is circled in red. The main content area displays 'ABC Company' details, including Company Name, Website Link, Comments, Documents visible by all Carrier Organisations, Locations Covered, Services Provided, and Classes of Business.

Please then complete your details as per your registered company's details.

The screenshot shows the Gemini [Experts] dashboard with the 'Moneycorp Registration' tab selected. The form fields for 'Your company's details' are circled in red, including Registered Company Name, Registered Company Address, Address Line 1, Address Line 2, Address Line 3, City, Postal Code, and Country. The 'Save & Submit' button is circled in red.

Once you enter your company details select 'Save and Submit'.

6.1.2 How to add Moneycorp users

Please note: All Moneycorp users will need their IDD and mobile number completed

After you save your company details, you can then add your Moneycorp users by selecting 'Add New User'.

The screenshot shows the 'Moneycorp Registration' page in the Gemini [Experts] system. The page has a sidebar with navigation links: My Area, Company Instructions, Company Invoices, Admin, User Guide, and Invoices and Payments Pipeline. The main content area is titled 'Moneycorp Registration' and includes a section for 'Your company's details' with fields for Registered Company Name, Registered Company Address, Address Line 1, Address Line 2, Address Line 3, City, Postal Code, and Country. A green 'Save & Submit' button is at the bottom right. Below this is a section titled 'Request a New Moneycorp User Account' with a green 'Add New User' button circled in red. Below the button is a table with columns: Name, Email, MoneycorpStatus, IDD Code, and Mobile Number. The table is currently empty, showing 'No users added'. A red note at the bottom states: 'To complete your Moneycorp registration please enter in all requested Moneycorp users IDD code and mobile number'. A green 'Confirm Registration' button is at the bottom right.

You will then see a pop out box where you can select the user from the dropdown. All users will need to be created prior to selecting them within this area as previously shown in section 6.2.

The screenshot shows the 'Add Moneycorp User' pop-up box. The box has a title bar 'Expert Admin - Moneycorp Registration - Add User'. The main content area is titled 'Add Moneycorp User' and includes a 'Select User' dropdown menu circled in red. Below the dropdown is a checkbox labeled 'This user acknowledges that their personal information will be sent to Moneycorp for the purposes of setting them up with a Moneycorp account'. A green 'Add' button is at the bottom left of the pop-up.

Once you select the Moneycorp user you will have to confirm that their personal information can be sent to Moneycorp for the purposes of setting up their a Moneycorp account then select 'Add'.

The screenshot shows the 'Add Moneycorp User' pop-up box. The box has a title bar 'Expert Admin - Moneycorp Registration - Add User'. The main content area is titled 'Add Moneycorp User' and includes a 'Select User' dropdown menu with 'Tom McArthur' selected. Below the dropdown is a checkbox labeled 'This user acknowledges that their personal information will be sent to Moneycorp for the purposes of setting them up with a Moneycorp account'. A green 'Add' button is at the bottom left of the pop-up, circled in red.

To complete your Moneycorp registration please select 'Confirm Registration'.

Gemini [Experts] -

Company Profile Registration and Due Diligence Private Areas Panels User Admin

View Company Profile Company HQ/Branches Moneycorp Registration

Moneycorp Registration

Your company's details

Registered Company Name: ABC Company

Registered Company Address:

Address Line 1 *: 3 Lombard Street City *: London

Address Line 2: Postal Code *: EC3V 9AA

Address Line 3: Country *: United Kingdom

Save & Submit

Request a New Moneycorp User Account

Add New User

Name Username	Email	Moneycorp Status	IDD Code	Mobile Number	
Tom McArthur Tom.Expert	tom.mcarthur@advent.claims	Draft	44	7806809547	Add mobile Delete

To complete your Moneycorp registration please enter in all requested Moneycorp users (IDD Code and Mobile Number)

Confirm Registration

The user will be added to the Moneycorp site and sent a confirmation email with their login credentials and pin activation code. The user will have 24 hours to activate their account once this email has been received. Please follow the instructions within the user guide below to complete your banking details within the Moneycorp system.

Please note: If you are submitting bank details for a bank based in the USA, you must include an ABA code if you have one. If you do not, these details may be queried with your Expert company in the future.

Please note: If you have not received the Moneycorp activation email within two-working days from the time the request was made, Ecliptic can add the beneficiary details to the Moneycorp platform on your behalf over a Teams call. To request this, please contact geminihelpdesk@ecliptic.tech.

[Moneycorp User Guide.pdf](#)

6.1.3 How to de-authorize a Moneycorp user

To de-authorize a Moneycorp user select into 'Manage Moneycorp Registrations'

Gemini [Experts]

Company Profile | Registration and Due Diligence | Private Areas | Panels | User Admin

View Company Profile | Company HQ/Branches

ABC Company

[Edit Company Profile](#)
[Manage MoneyCorp Registrations](#)

Company Details

Company Name ABC Company

Website Link

Comments -

Documents visible by all Carrier Organisations

File	Description

Locations Covered

Country/Territory	City
Americas	
Anguilla	The Valley
Anguilla	Blowing Point Village
Anguilla	Sandy Ground Village
Antigua and Barbuda	All Saints
Antigua and Barbuda	Bolans
Antigua and Barbuda	Codrington

Services Provided

Expert Type	Expert Sub Category
Adjusting	1st Party
Adjusting	3rd Party

Classes of Business

High Level Class of Business
Property (D&F)
Casualty FinPro
Casualty Other

Select 'De-authorize' within the section 'Previous Moneycorp user account requests'

Gemini [Experts]

Company Profile | Registration and Due Diligence | Private Areas | Panels | User Admin

View Company Profile | Company HQ/Branches | **Moneycorp Registration**

Moneycorp Registration

Your company's details

Registered Company Name ABC Company

Registered Company Address

Address Line 1 * 3 lombard street **City *** London

Address Line 2 **Postal Code *** EC3V 9AA

Address Line 3 **Country *** United Kingdom

[Save & Submit](#)

Request a New Moneycorp User Account

[Add New User](#)

Name Username	Email	MoneycorpStatus	IDO Code	Mobile Number
No users added				

To complete your Moneycorp registration please enter in all requested Moneycorp users IDO code and mobile number

[Confirm Registration](#)

Previous Moneycorp user account requests

Name Username	Email Address	Mobile Number	Status	Requested By	Date Requested	
Tom McArthur Tom.Expert	tom.mcarthur@advent.claims	447806809547	Awaiting Authorisation	Tom McArthur	Wed, 03 Jun 2020 07:03 am	De-authorize Account Set up

This will send a notification to Moneycorp to remove access for the applicable user.

tea

7 Instructions

7.1 Instructions

Once an instruction has been created, you will receive an email notification from the GEMINI system of the instruction along with the instruction details. If the Carrier has instructed a Registered Expert, then the Registered expert will receive the email notification and all Expert Admin Users will be copied into the email notification. The Admin Users will then be able to access the link within the email to view the instruction.

Please note: a Managing Agent is able to update the claim details at any point of the claim. This will include the UCR and UMR, which will be sent in your original notification.

7.2 How to view your individual instructions

To view your individual instructions, select 'My Area' and then 'My Instructions'. The user can use the filtered search to help them find an instruction. Once you have found the instruction you want to view, click the instruction reference number on the left-hand side. This will take you into the instruction. From here you can see all tasks, documents and financials related to the claim.

An Expert user can view all open, closed & cancelled instructions by using the 'Status' filter.

The screenshot shows the GEMINI [Experts] interface. The 'My Instructions' tab is selected and highlighted with a red circle. The interface includes a sidebar with navigation options, a main area with filter instructions, and a table of instructions.

Filter Instructions

UCR / Claim Ref
Insured / Reinsured
Country
Status
Date of Loss To
Created By User
Expert Sub Category
Expert Appointed By
Expert Claim Reference
Free Carrier

UMR / Policy Ref
Loss Name
GEMINI Instruction Ref
Date of Loss From
Created By Company
Expert Type
Expert Role
Status
Expert Claim Reference (Expert's Version)
Exact Loss Location

Instructions Table

Source Instruction Ref	Expert Claim Reference	Free Carrier	Exact Loss Location	Created By Carrier Organization	UCR / Claim Ref	UMR / Policy Ref	Free Reserve & Currency	Total Payment (USD)	Payment No	Status	Reserve count	Date created
Inst-A29	Not Available	-	-	Test Company	8123	8456	-	-	-	Open	0	Fri, 04 Jun 2022 10:04 pm
Inst-521	Not Available	-	-	Test Company	8123	8456	-	-	-	Open	0	Fri, 04 Jun 2022 10:20 pm
Inst-523	Not Available	-	-	Test Company	8123	8456	-	-	-	Open	0	Fri, 04 Jun 2022 10:59 pm
Inst-A25	Not Available	-	-	Test Company	8188	8789	31431.00 USD	-	0%	Open	0	Thu, 11 Jun 2022 17:13 pm

7.3 How to add your Expert Reference to the instruction

Once an instruction has been received the user will be able to enter their own Expert claim reference onto the instruction. To enter your Expert Claim Reference, select into the relevant file by following the instructions above. The user can then enter this into a free text field labelled 'Expert Claim Reference'

View Expert Appointment

Claim details

UCR / Claim Ref: 8888
 UMR / Policy Ref: 8888
 Insured / Reinsured: 8888
 Loss Name: 8888
 Loss Location: Albania
 Date of Loss From: Tue, 01 Jun 2021
 Date of Loss To: -
 Created By Company: Test Company
 Created By User: George McCarthy (George.McCarthy@adventinsurancemanagement.com)
 Lead Adjuster: George McCarthy (George.McCarthy@adventinsurancemanagement.com)
 Claim Handler: George McCarthy (George.McCarthy@adventinsurancemanagement.com)
 Comments: -

Instruction Details

Expert Claim Reference: -
 Fee Earner: -
 Exact Loss Location: -
 Expert Type: Surveyor
 Expert Sub Category: Surveyor
 Expert Role: Direct
 Expert Appointed By: Carrier
 Instruction Description: -
 Status: Open
 Date created: Thu, 10 Jun 2021 18:11 pm
 Instruction Duration to date: 788 days 4 hours
 Billing Vendor Used?: No

Financial Details

Fee Reserve: 3,643.00 USD
 Fee Budget: 2,762.00 USD
 Total Payment (USD): -
 Erosion %: 0%

Assign Expert

Company: *
 Select a company
 Expert User: George McCarthy
 Assign

Expert Claim Reference

Expert Claim Reference (Expert Version):
 This field can be updated if showing incorrectly from the Carrier
 Save

List of Carriers

Company (Carrier Code)	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Signed Percentage Rule
-	-	-	No	No	-
Total	-	-	-	-	-

Selecting 'Save' will save this entry to the file.

7.4 How to add a task to an instruction

Select an instruction as shown in section 8.1 and then you are able to add a task by clicking 'Add Task'.

Claim Handler

George McCarthy (George.McCarthy@adventinsurancemanagement.com)
 Billing Vendor Used?: No

List of Carriers

Company (Carrier Code)	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Signed Percentage Rule
-	-	-	No	No	-
Total	-	-	-	-	-

Payment Summary to Date (USD)

Total Defence	\$0
Total Coverage	\$0
Total Subrogation	\$0
Total Adjuster Fee	\$0
Total Disbursement & Expenses	\$0
Total Other Expert	\$0
Total TPA Coverholder Fee	\$0
Total Fee Spend	\$0

Instruction Documents

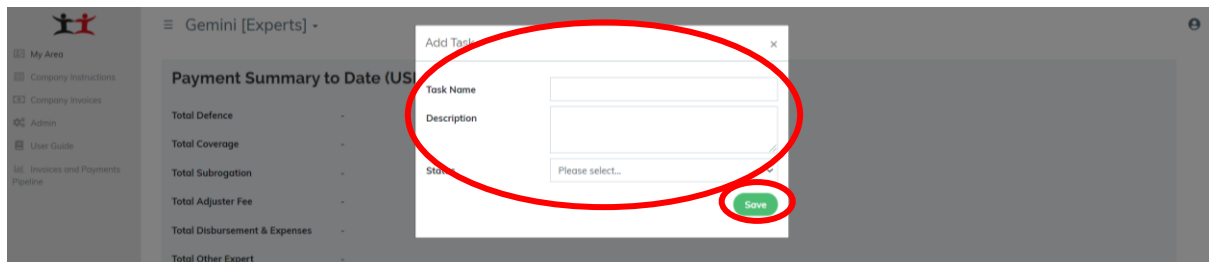
No records to show
 Add Document

Tasks Associated To Instruction

Task Ref	Task Name	Description	Status	Date created
-	-	-	-	-

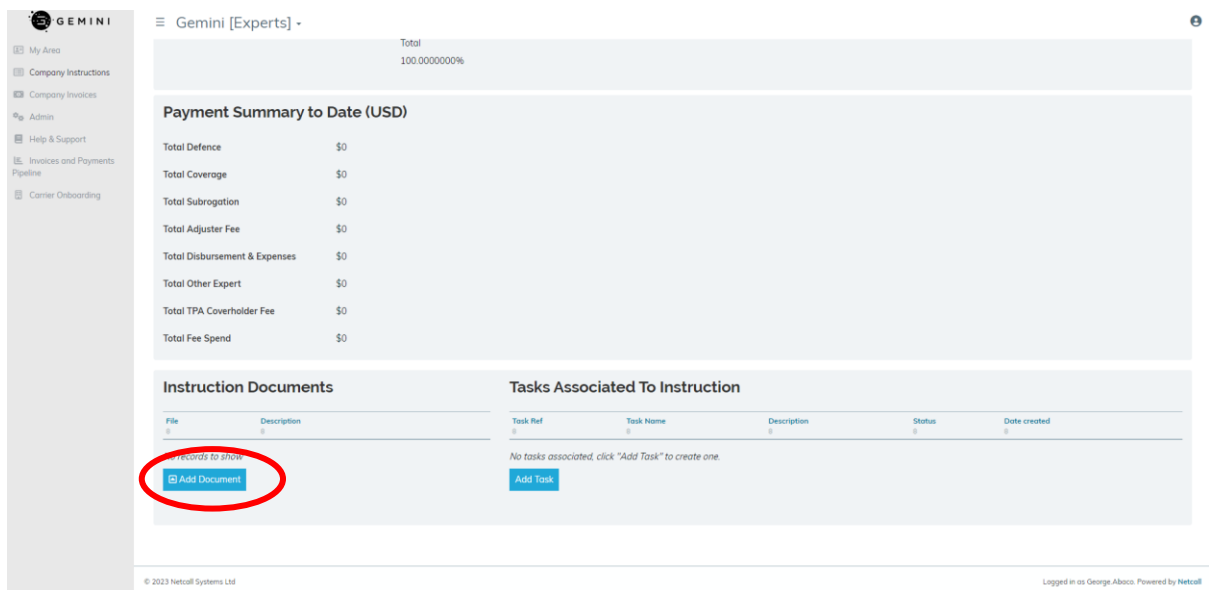
Add Task

The system will direct you to enter in the task details – giving a name of the task, the description and the status. Once this is completed select 'Save'.

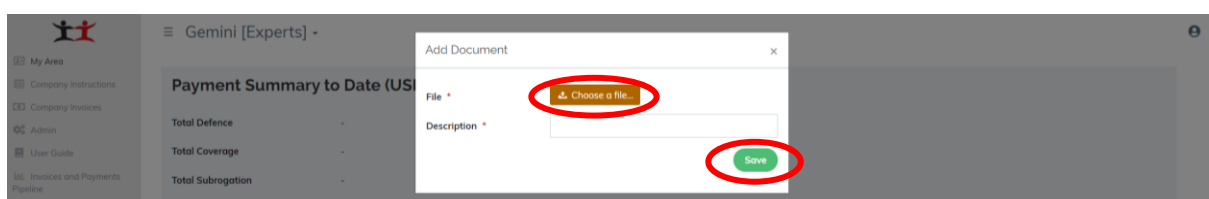


7.5 How to add a document to an instruction

Select into an instruction as shown above and then you can add a document by clicking 'Add Document'.



The system will then bring forward a page for you to choose the file and give a description around the document you are uploading.



7.6 Company instructions (admin users only)

Expert admin users will also be able to view all instructions received by the Carriers. Each Expert admin user will have the option to look at all unassigned, assigned and cancelled instructions.

Gemini [Experts] -

My Area
Company Instructions
Company Invoices
Admin
User Guide
Invoices and Payments Pipeline

Unassigned Instructions Assigned Instructions Cancelled Instructions

Assigned Instructions Within ABC Company

Instruction Ref	Created by Carrier Organisation	UMR / Policy Ref	UCR / Claim Ref	Fee Reserve/Budget	Instruction Currency	Total Payments	Payments(USD)	Payments(GBP)	Payments(EUR)	Erosion %	Status	Date created
Instr-262	Managing Agent Company	B5600MT4566	B5600MT4566	8,000.00	United Kingdom Pound	-	-	-	-	0%	Open	Wed, 03 Jun 2020 09:22 am

To select into an individual instruction please select the instruction reference

Gemini [Experts] -

My Area
Company Instructions
Company Invoices
Admin
User Guide
Invoices and Payments Pipeline

Unassigned Instructions Assigned Instructions Cancelled Instructions

Assigned Instructions Within ABC Company

Instruction Ref	Created by Carrier Organisation	UMR / Policy Ref	UCR / Claim Ref	Fee Reserve/Budget	Instruction Currency	Total Payments	Payments(USD)	Payments(GBP)	Payments(EUR)	Erosion %	Status	Date created
Instr-262	Managing Agent Company	B5600MT4566	B5600MT4566	8,000.00	United Kingdom Pound	-	-	-	-	0%	Open	Wed, 03 Jun 2020 09:22 am

7.6.1 How to assign a company instruction

A Carrier can appoint your company to an instruction which will be left unassigned for an Expert admin user to assign. You can choose the Expert best suited to deal with this instruction by selecting 'Company Instructions' -> 'Unassigned Instructions' -> select the reference number for the instruction you want to assign.

Gemini [Experts] -

My Area
Company Instructions
Company Invoices
Admin
User Guide
Invoices and Payments Pipeline

Unassigned Instructions Assigned Instructions Cancelled Instructions

Unassigned Instructions Within ABC Company

Instruction Ref	Created by Carrier Organisation	UCR / Claim Ref	UMR / Policy Ref	Fee Reserve/Budget	Instruction Currency	Total Payments	Payments(USD)	Payments(GBP)	Payments(EUR)	Erosion %	Status	Date created
Instr-261	ABC Insurance Limited	B1524MN12345	B1524MN12345001	8,000.00	United States Dollar	-	-	-	-	0%	Open	Wed, 03 Jun 2020 09:48 am

Once you select into the instruction you can assign the instruction by selecting an Expert from the 'Assign Expert' area.

Gemini [Experts] - View Expert Appointment

Claim details

UCR / Claim Ref: B1204Prodiss1
 UMR / Policy Ref: B6037AFC192545C16
 Insured / Reinsured: ABC Insurance Limited
 Loss Name: COLLISION IRISH SEA
 Loss Location: India
 Date of Loss From: Sat, 21 Aug 2021
 Date of Loss To: Sun, 22 Aug 2021
 Created By Company: Talbot
 Created By User: ()
 Lead Adjuster: ()
 Claims Handler: ()
 Comments: -

Instruction Details

Instruction Number: Inst-783
 Expert Claim Reference: -
 Fee Earner: -
 Exact Loss Location: -
 Expert Type: Adjusting
 Expert Sub Category: 1st Party
 Expert Role: Direct
 Expert Appointed By: Carrier
 Appointed By: ()
 Instruction Description: -
 Status: Open
 Date created: Thu, 21 Oct 2021 15:15 pm
 Instruction Duration to date: 652 days 6 hours
 Billing Vendor Used?: No

Financial Details

Fee Reserve: 25,000.00 USD
 Fee Budget: 25,000.00 USD
 Total Payment (USD): -
 Erosion %: 0%

Assign Expert

Company: ABC International Loss Adjusters
 Expert User: Please select...
 Assign

Expert Claim Reference

Expert Claim Reference (Expert Version):
 This field can be updated if showing incorrectly from the Carrier
 Save

List of Carriers

Company (Carrier Code)	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Signed Percentage Rule
Talbot(Lloyd's 1183)	50.00000000%	-	Yes	Yes	Lead
Dale(Lloyd's 1729)	25.00000000%	-	No	No	Follower
-	25.00000000%	-	No	No	Follower

The admin user will be able to select from all Experts available within the listing.

Gemini [Experts] - View Expert Appointment

Claim details

UCR / Claim Ref: B1204Prodiss1
 UMR / Policy Ref: B6037AFC192545C16
 Insured / Reinsured: JAKARTA LTD
 Loss Name: COLLISION IRISH SEA
 Loss Location: India
 Date of Loss From: Sat, 21 Aug 2021
 Date of Loss To: Sun, 22 Aug 2021
 Created By Company: ABC Insurance Limited
 Created By User: ()
 Lead Adjuster: ()
 Claims Handler: ()
 Comments: -

Instruction Details

Instruction Number: Inst-783
 Expert Claim Reference: -
 Fee Earner: -
 Exact Loss Location: -
 Expert Type: Adjusting
 Expert Sub Category: 1st Party
 Expert Role: Direct
 Expert Appointed By: Carrier
 Appointed By: ()
 Instruction Description: -
 Status: Open
 Date created: Thu, 21 Oct 2021 15:15 pm
 Instruction Duration to date: 652 days 6 hours
 Billing Vendor Used?: No

Financial Details

Fee Reserve: 25,000.00 USD
 Fee Budget: 25,000.00 USD
 Total Payment (USD): -
 Erosion %: 0%

Assign Expert

Company: ABC International Loss Adjusters
 Expert User: Please select...
 George McCarthy
 Assign

Expert Claim Reference

Expert Claim Reference (Expert Version):
 This field can be updated if showing incorrectly from the Carrier
 Save

List of Carriers

Company (Carrier Code)	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Signed Percentage Rule
Talbot(Lloyd's 1183)	50.00000000%	-	Yes	Yes	Lead
Dale(Lloyd's 1729)	25.00000000%	-	No	No	Follower
-	25.00000000%	-	No	No	Follower

When you have chosen the Expert to deal with the instruction click 'Assign'.

The Expert user can re-assign an assigned instruction by completing the same process.

8.1 How to upload an invoice to an instruction

8.1.1 Billing Vendors exceptions

Where the Instruction has been indicated to be billed outside of GEMINI the Expert will not have the ability to upload any invoices directly into the GEMINI system. The Expert will still be able to view all invoices that have been submitted onto this claim. Please see the below screenshot as reference – the “New Invoice” button is greyed out and a warning is shown underneath.

35

In order to submit a claim successfully to your Billing Vendor; an additional field is required to be provided to your Billing Vendor known as your Recipient ID. The Recipient ID is a low-level system reference that corresponds to an individual bank account set up within Moneycorp. For more details on setting up your Moneycorp account, see section 8.

Navigate to Admin > Company Profile > Manage Moneycorp registrations, as per the below screenshot. On the 'Manage Moneycorp Registration' page, if you have successfully set up a Moneycorp account and added a bank account, it should look as below. The ID you are looking for is the "Recipient ID", highlighted below.

Moneycorp Registration

Bank accounts

Use the Recipient ID when submitting invoices to a Bill Vendor.

Recipient ID	Bank Account Name	Moneycorp Currency
52625	US Bank Account	USD

Your company's details

Registered Company Name: abaco

Registered Company Address: hello

Address Line 1: Address Line 2: City: 4436 Postal Code: cm4 0gf

This is the reference that will need to be provided to your Billing Vendor in order for your invoice to be successfully processed.

8.1.2 How to add an invoice

Once you have been notified of a new instruction you will be provided with a link which will direct you into GEMINI and the applicable instruction. From there you can select 'Manage Invoices'.

View Expert Appointment (Instr-2974)

Claim details

UCR / Claim Ref	B111103042025
UMR / Policy Ref	B111103042025
Insured / Reinsured	111103042025
Loss Name	111103042025

Instruction Details

Instruction Number	Instr-2974
Expert Claim Reference	-
Fee Earner	-
Exact	-

Expert Details

Assigned to Expert: Jake Brewster

Expert Claim Reference: Not Available

Financial Details

Fee: 0.00 Reserve

Assign Expert

Company: jBrewsterExpert

Expert User: Jake Brewster

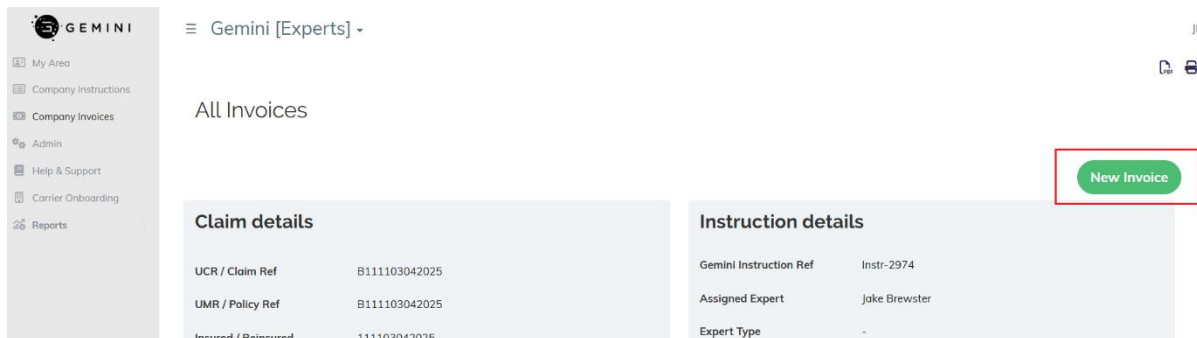
Manage Invoices

Assign

You will then be met with a ‘Toggle’ to switch between “Invoice Mode” and “Batch Mode”. This section will guide you through “Invoice Mode”. Please see Section 8.2 for steps on submitting a batch.

Note: If the Lead Carrier on the claim has opted out of invoice batching, you will not see this toggle and will not be able to batch your invoices.

Select ‘New Invoice’.



8.1.3 How to complete your invoice details

All four fields within ‘Invoice Details’ have to be completed before submitting your invoice.

The screenshot shows the 'Add Invoice' form in the Gemini [Experts] interface. The form is titled 'Add Invoice' and 'Invoice Details'. It includes the following fields and callouts:

- Expert Invoice Ref ***: A text input field. Callout: "Please enter your internal invoice number."
- Invoice Description ***: A text input field. Callout: "Please enter the invoice description."
- Comments to Underwriter**: A text input field. Callout: "If you wish to provide any comments to the Underwriter, there is an opportunity to do so here. These comments will be added to the Parallel UCR on ECF."
- Currency ***: A dropdown menu with the option "Please select...". Callout: "Please select the currency of the invoice that you wish to be paid in."
- Bank Account ***: A dropdown menu with the option "Please Select Currency and Bank Account". Callout: "Please select from your bank accounts saved within Moneycorp."
- PDF Upload**: A section with a text input field and a button. Callout: "To upload a file please select into the boxed area or drag and drop your file onto..."

The form also displays 'Created By' (Jake Brewster) and 'Date/Time Created' (Tue, 08 Apr 2025 13:48).

Next you will need to add a PDF of the invoice along with any supporting documents. You can do this by dragging the relevant document into the boxed area.

☰ Gemini [Experts] -

UCR / Claim Ref
B111103042025

Loss Name
111103042025

Insured / Reinsured
111103042025

Instructions Ref
str-2974

Total Invoice Amount

0.00

● The total amount of the invoice, including any disbursements, expenses and sales tax being requested for Lloyd's market share

Defence

0.00

● Any charges (Lloyd's market share) relating to the defence of the (Re)insured, excluding any disbursements, expenses, or any sales tax

Coverage

0.00

● Any charges (Lloyd's market share) relating to policy coverage, for the benefit of the (Re)insurer, excluding any sales tax

Monitoring Counsel

0.00

● Any charges (Lloyd's market share) relating to Monitoring Counsel, for the benefit of the (Re)insurer, excluding any sales tax

Adjuster Fee

0.00

● Any charges (Lloyd's market share) relating to loss adjusting/assessing of the (Re)insured's claim, excluding any sales tax

Subrogation

0.00

● Any charges (Lloyd's market share) specifically attributable to the subrogation / recovery of either (Re)insurers outlay, where not included within any wider claims handling fixed fee, excluding any sales tax

Disbursement & Expenses

0.00

● Any disbursements or expenses (Lloyd's market share), excluding any sales tax

Other Expert

0.00

● Any charges (Lloyd's market share) relating to any service other than legal, loss adjusting, TPA claims handling or subrogation, excluding any sales tax

TPA Coverholder Fee

0.00

● TPA fees will generally be paid outside of individual claims transactions, but where a TPA does need to collect their claims handling fee under an individual claim, this should be recorded here, excluding any sales tax

Tax Amount

0.00

● TPA fees will generally be paid outside of individual claims transactions, but where a TPA does need to collect their claims handling fee under an individual claim, this should be recorded here, excluding any sales tax

Tax Rate Applied

0.00

● Please confirm the percentage rate of tax applying to your invoice

Total (Calculated)

0.00

● The calculated sum of all of the amounts above. Must match the Total Invoice Amount

Please complete this field with the total of your invoice, before any market share is applied.

You will then need to complete the fee breakdown using any of these fields that are relevant to your invoice. This should add up to the "Total Invoice Amount".

You will be mandated to add in the "Amount Payable". This should be the amount the Expert company is expecting to receive as a result of this submission, and should match the "ECLIPTIC Collection Amount" shown in the "Market Breakdown". Here the Expert User can view the share per Bureau for the given Expert company under this claim, and as a result the amount ECLIPTIC will collect from the market and pay to you.

☰ Gemini [Experts] ▾

UCR / Claim Ref B111103042025	Loss Name 111103042025	Insured / Reinsured 111103042025	Gemini Instruction Ref Instr-2974
----------------------------------	---------------------------	-------------------------------------	--------------------------------------

Amount Payable

Amount Payable *
① The amount which expert is expecting to receive

Expert Final Invoice ?

Final Invoice *
① If 'Yes', the user will not be allowed any further invoices to be entered

Market Breakdown

ECLIPTIC Collection %		ECLIPTIC Collection Amount	
Lloyd's	100.00000000%	Lloyd's	0.00
LIRMA	0	LIRMA	0.00
ILU	0	ILU	0.00

① Saves a draft to be edited later
 ② Sends to Ecliptic for processing
 ③ To save a draft, please enter an Expert Invoice Ref

Please then select whether this is your final invoice by selecting either 'Yes' or 'No' from the drop down.

Once you have completed all mandatory fields, you can either:

- Save and Exit
 - Saves a draft to be edited later.
- Submit
 - Sends the invoice to Ecliptic for processing.

8.1.4 How to amend a saved invoice

To amend a saved invoice please select into the applicable instruction then select 'Manage Invoices'

☰ Gemini [Experts] ▾ JB

My Area Company Instructions Company Invoices Admin Help & Support Carrier Onboarding Reports

View Expert Appointment (Instr-2974)

Claim details UCR / Claim Ref B111103042025 UMR / Policy Ref B111103042025 Insured / Reinsured 111103042025 Loss Name 111103042025	Instruction Details Instruction Number Instr-2974 Expert Claim Reference - Fee Earner - Exact -	Expert Details Assigned to Expert Jake Brewster Expert Claim Reference Not Available Financial Details Fee Reserve 0.00	Assign Expert Company * jBrewsterExpert Expert User Jake Brewster Assign
---	--	---	---

You can then see all invoices that can be amended within the section 'Pending Invoices'. To amend an invoice please select 'Amend'. You can also remove any invoices that are in 'Draft' state by clicking the 'Delete' button.

For a guide on submitting refunds via GEMINI, please reach out to GEMINIHelpdesk@ecliptic.tech.

≡ Gemini [Experts] ▾

JB

All Invoices

New Invoice

Claim details

UCR / Claim Ref

B111103042025

UMR / Policy Ref

B111103042025

Insured / Reinsured

111103042025

Loss Name

111103042025

Loss Location

Peru

Date of Loss From

not known

Date of Loss To

-

Created By Company

JakeBrewsterTestCarrier

Created By User

Jake Brewster (jake.brewster@ecliptic.tech)

Instruction details

Gemini Instruction Ref

Instr-2974

Assigned Expert

Jake Brewster

Expert Type

-

Expert Sub Category

-

Instruction Description

-

Fee Reserve

0.00

Fee Budget

-

Status

Open

Date created

Thu, 03 Apr 2025 14:02

Pending Invoices

4

Search Invoices ▾

Pending Invoices

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Advent Collection %	Advent Collection Amount	Status	Final?	Created By	Submitted By	Date submitted	
G04251004217	1001JBTesting1001	USD	1,000.00	100.00000000%	1,000.00	Draft	No	Jake Brewster	Not Submitted	Not Submitted	View Amend Delete

Once you have amended this invoice select ‘Submit’ and it will be sent to Ecliptic for processing.

8.1.5 How to resubmit a queried invoice

If an invoice is queried by either ECLIPTIC or the Carrier you will receive an email to notify you of this rejected/queried invoice along with the reason why.

You can either select the link provided in the email, which will direct you to the applicable invoice, or you can login to the GEMINI portal and locate the instruction.

[New Invoice](#)

Claim details

UCR / Claim Ref	B111103042025
UMR / Policy Ref	B111103042025
Insured / Reinsured	111103042025
Loss Name	111103042025
Loss Location	Peru
Date of Loss From	not known
Date of Loss To	-
Created By Company	JakeBrewsterTestCarrier
Created By User	Jake Brewster (jake.brewster@ecliptic.tech)

Instruction details

Gemini Instruction Ref	Instr-2974
Assigned Expert	Jake Brewster
Expert Type	-
Expert Sub Category	-
Instruction Description	-
Fee Reserve	0.00
Fee Budget	-
Status	Open
Date created	Thu, 03 Apr 2025 14:02
Pending Invoices	1

Search Invoices ▾

Pending Invoices

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Advent Collection %	Advent Collection Amount	Status	Final?	Created By	Submitted By	Date submitted	
G04251004217	1001JBTesting1001	USD	1,000.00	100.00000000%	1,000.00	Queried by ECLIPTIC - Expert Review Required	No	Jake Brewster	Jake Brewster	Tue, 08 Apr 2025	View Amend

From here, you have two options:

1. You can amend the rejected/queried invoice and resubmit for processing.
2. You can respond to the comment left by Ecliptic.

To amend and resubmit, click 'Amend', make any necessary adjustments to the submission, attach any supporting documentation, and click Submit.

To respond to Ecliptic, click 'Amend'. You can select 'Add Comment' if you require any clarification on the query. By selecting 'View Comment', a full history of the comments left by both the Expert user and Ecliptic will be visible.

Once Ecliptic responds to your comment, you will receive another email notification, giving you the chance to resubmit or respond.

Please note, you should only add a comment using this method if you are not immediately resubmitting the invoice and need clarification from Ecliptic on your next steps.

[Back](#)

Invoice - Gemini Invoice Ref : G04251004217

Reviewed/Queried Comments

Hello, This invoice is being queried by the Lead because...

Expert Queried Comment

[Add Comment](#) [View Comment](#)

Invoice Details

Expert Invoice Ref *

1001JBTesting1001

Invoice Description *

1001JBTesting

Comments to Underwriter

Currency *

USD

Bank Account *

Jane Baker

Created By

Jake Brewster

Date/Time Created

Tue, 08 Apr 2025 13:48

Submitted By

Jake Brewster

Date submitted

Tue, 08 Apr 2025

Queried

Yes

You will also be able to see the comment history on the submission by clicking ‘View’ on the invoice entry.

Claim details

UCR / Claim Ref

B111103042025

UMR / Policy Ref

B111103042025

Insured / Reinsured

111103042025

Loss Name

111103042025

Loss Location

Peru

Date of Loss From

not known

Date of Loss To

-

Created By Company

JakeBrewsterTestCarrier

Created By User

Jake Brewster (jake.brewster@ecliptic.tech)

Instruction details

Gemini Instruction Ref

Instr-2974

Assigned Expert

Jake Brewster

Expert Type

-

Expert Sub Category

-

Instruction Description

-

Fee Reserve

0.00

Fee Budget

-

Status

Open

Date created

Thu, 03 Apr 2025 14:02

Pending Invoices

1

[New Invoice](#)

Search Invoices ▾

Pending Invoices

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Advent Collection %	Advent Collection Amount	Status	Final?	Created By	Submitted By	Date submitted	
G04251004217	1001JBTesting1001	USD	1,000.00	100.000000000%	1,000.00	Queried by ECLPTIC - Expert Review Required	No	Jake Brewster	Jake Brewster	Tue, 08 Apr 2025	View Amend

8.2 Invoice Batching

8.2.1 How to create an invoice batch

Once you have been notified of a new instruction you will be provided with a link which will direct you into GEMINI and the applicable instruction. From there you can select ‘Manage Invoices’.

Claim details

UCR / Claim Ref

B1234IB56789Demo

UMR / Policy Ref

B1234IB56789Demo

Insured / Reinsured

Batch Demo

Loss Name

Batch Demo

Loss Location

United Kingdom

Date of Loss From

Tue, 30 Sep 2025

Instruction Details

Instruction Number

Instr-3321

Expert Claim Reference

-

Fee Earner

-

Exact Loss Location

-

Expert Type

Not set

Expert Details

Assigned to Expert

Jake Brewster

Expert Claim Reference

Not Available

Financial Details

Fee Reserve

-

Assign Expert

Company *

JBrewsterExpert

Expert User

Jake Brewster

Assign

You will then be met with a ‘Toggle’ to switch between “Invoice Mode” and “Batch Mode”. This section will guide you through “Batch Mode”. Please see Section 8.1 for steps on submitting an individual invoice.

Note: If the Lead Carrier on the claim has opted out of invoice batching, you will not see this toggle and will not be able to batch your invoices. You can only batch invoices if they belong to the same GEMINI instruction.

Select “New Invoice Batch”.

UCR / Claim Ref	Loss Name	Insured / Reinsured	Instruction Ref	View	Action Button
B1234IB56789Demo	Batch Demo	Batch Demo	Instr-3321	Details	New Invoice Batch

Search for Invoices

Click to Toggle between Invoice Mode and Batch Mode

Batch

You will be met with a pop-up requesting a ‘Batch Description’. Complete this and select ‘Save’.

You will be navigated to the “Batch Details” screen, this is where you can add invoices to the batch.

Batch Details (IB1000000210)

Carrier Company

JakeBrewsterTestCarrier

UCR / Claim Ref

B1234IB56789Demo

GEMINI Instruction Ref

Instr-3321

Status

Draft

Ecliptic Collection %

100.00000000%

BV Used?

No

List of Batch Invoices

Add New Invoice to Batch

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Ecliptic Collection Amount	Completed ?	Attachments

Please add at least (2) invoices before submitting your batch.

Minimum invoices required: 2

Submit Batch

After selecting “Add New Invoice to Batch” you will be navigated to an invoice submission screen. To learn about this screen please see Section 8.1.3.

After completing the invoice details, select “Submit to Batch” to finalise this invoice. This can be edited later, if necessary, before you submit the batch for processing.

GEMINI batches have a limit of 19 documents, as you add invoices the text in yellow will inform you of how many more documents you can add to the batch before the limit is reached. If you need to

remove documents because this limit has been breached, you can do so easily by selecting the number under the “Attachments” column.

List of Batch Invoices

Add New Invoice to Batch

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Ecliptic Collection Amount	Completed ?	Attachments			
USD									
G10251004988	IBDemo001	USD	1,000.00	1,000.00	Ready for Batch Processing	3	Edit	Remove	Delete
G10251004990	IBDemo002	USD	1,000.00	1,000.00	Ready for Batch Processing	4	Edit	Remove	Delete
G10251004991	IBDemo003	USD	1,000.00	1,000.00	Ready for Batch Processing	6	Edit	Remove	Delete
				Total					
				3,000.00					

Download CSV

Current total attachments: 13. You may only submit 6 more attachments to this batch.

Submit Batch

This will display a pop-up showing the documents you have attached to the chosen invoice. From here you can select the documents you wish to remove and choose “Delete Invoice Attachments” from the dropdown.

Invoice Attachments

Supported Documents

	File	Description	Document Type	Date created
☒	TEST INVOICE.pdf	Invoice	Invoice	Fri, 24 Oct 2025 13:42 pm
☒	TEST INVOICE.pdf	Invoice	Invoice	Fri, 24 Oct 2025 13:42 pm
☐	TEST INVOICE.pdf	Invoice	Invoice	Fri, 24 Oct 2025 13:42 pm
☐	TEST INVOICE.pdf	Invoice	Invoice	Fri, 24 Oct 2025 13:42 pm

Selected Records (2)

Please Select...

Submit

Please Select...

Delete Invoice Attachments

Once you are happy with your batch, select “Submit Batch”. Your batch will then be sent to Ecliptic for processing will have the status “Submitted for Validation”.

8.2.2 Automated batches

If the Lead Carrier on the claim you are submitting invoices to has not opted out of batching, invoices you submit to GEMINI individually (outside of the process detailed in the previous section) will be automatically batched with other invoices you submit to the same GEMINI instruction.

Once you submit an invoice to an instruction (in line with Section 8.1.2), it will be sent to Ecliptic. The invoice will not be processed until a set time has elapsed (this is defaulted to 12 calendar hours but can vary between Lead Carrier).

This invoice will be batched with any further invoices you submit to the instruction within this time. Once the timer has elapsed, the batch will be finalised, and Ecliptic will process and wait for Carrier approval.

8.2.3 Tracking your batches

You can navigate to the “Company Invoice Batches” page to track the statuses of your invoice batches. From here two tabs are available:

- Pending Batches
 - Shows batches that have not been paid
- Completed Batches
 - Shows batches that have been paid

You can filter on both tabs by claim/instruction/invoice details to locate a particular batch.

My Area

Elective Fee Service

Company Instructions

Company Invoices

Company Invoice Batches

Admin

Help & Support

Carrier Onboarding

Reports

Pending Batches

Completed Batches

Search for Invoice Batches

UCR / Claim Ref

GEMINI Invoice Ref

Invoice Batch Reference

Created By

Date Created From

Date Submitted From

Invoice Batch Status

GEMINI Instruction Ref

Expert Invoice Ref

Invoice Description

Submitted By

Date Created To

Date Submitted To

Batch Automated by System

Search

Reset

The pages listed below also make it clear if an invoice is part of a batch via the column highlighted below:

- “My Area” > “My Invoices”
- “Company Invoices”

Pending Invoices

GEMINI Instruction Ref	Claim Ref	GEMINI Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Advent Collection %	Advent Collection Amount	Invoice Batch Reference	Status	Final?	Created By	Date submitted	Submitted By	
Instr-3321	CLA/3192	G10251004988	IBDemo001	USD	1,000.00	100.00000000%	1,000.00	IB10000000210	Submitted for Validation	No	Jake Brewster	Fri, 24 Oct 2025	Jake Brewster	View
Instr-3321	CLA/3192	G10251004990	IBDemo002	USD	1,000.00	100.00000000%	1,000.00	IB10000000210	Submitted for Validation	No	Jake Brewster	Fri, 24 Oct 2025	Jake Brewster	View

8.2.4 How to resubmit a queried batch

Like individual invoices, batches can be queried and returned to you for amendments to be made. If a batch is queried you will receive an email containing the query and necessary action, as well as a link

to the GEMINI batch. From here you can make any amendment necessary and resubmit the batch for processing.

Batch Details (IB1000000210)

Carrier Company JokeBrewsterTestCarrier	UCR / Claim Ref B1234B56789Demo
GEMINI Instruction Ref Instr-3321	Status Queried by Edaptic
Ecliptic Collection % 100.00000000%	BV Used? No
Invoice count 3	Attachments 11
Date created Fri, 24 Oct 2025 13:22 pm	Submitted Date Fri, 24 Oct 2025 13:50 pm
Currency USD	Description Batch Demo Description

Reviewed/Queried Comments

Returning Batch for Demo

List of Batch Invoices

Add New Invoice to Batch

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Ecliptic Collection Amount	Completed ?	Attachments			
USD									
G10251004988	IBDemo001	USD	1,000.00	1,000.00	Ready for Batch Processing	3	Edit	Remove	Delete
G10251004990	IBDemo002	USD	1,000.00	1,000.00	Ready for Batch Processing	2	Edit	Remove	Delete
G10251004991	IBDemo003	USD	1,000.00	1,000.00	Ready for Batch Processing	6	Edit	Remove	Delete
			Total	3,000.00					

Download CSV

Current total attachments: 11. You may only submit 8 more attachments to this batch.

Submit Batch

8.2.5 Disbanded batches

Ecliptic can, if necessary, remove invoices from batches. When removed, the invoice will be processed separately and no longer form part of the batch.

If an invoice or invoices are removed from a batch, and as a result the batch contains <2 invoices, then the batch will be “Disbanded” and all invoices processed separately.

If a batch is “Disbanded” you will still be able to see the “Invoice Batch Ref”, with the exclaimer that there was “Insufficient Invoices”

Back to All Instruction Batches

Batch disbanded - Insufficient Invoices

Batch Reference - IB1000000210

The remaining invoice(s) seen below will be processed separately.

How to Submit an Invoice Batch

Batch Details (IB1000000210)

Carrier Company JokeBrewsterTestCarrier	UCR / Claim Ref B1234B56789Demo
GEMINI Instruction Ref Instr-3321	Status Disbanded

List of Removed Invoices

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Ecliptic Collection Amount	Status	Attachments	
G10251004991	IBDemo003	USD	1,000.00	1,000.00	Submitted for Validation	6	View

8.2.6 Batch Payments

Payment of invoice batches will be made as a lump sum to the relevant bank account you chose upon invoice submission. These will be referenced as per the “Invoice Batch Ref” which can be searched in either of the below locations:

- Company Invoices
- Company Invoice Batches

To ensure you are aware what invoices make up the payment, you are encouraged to make sure that the relevant contact within your organisation is assigned to the bank account within GEMINI as a remittance contact. When a batch is paid the contacts listed here will receive an email with a breakdown of the invoices that make up the payment.

This contact can be added by navigating to:

“Admin” > “Manage Moneycorp Registrations” > “View” > Add Contact

8.3 Lloyd’s Europe & Part VII Invoicing

Lloyd’s Insurance Company (LIC) are liable to the Belgian tax authority to pay VAT on services it has received from suppliers outside Belgium. This is commonly referred to as reverse charge VAT payable on cross border services. As part of LIC’s reporting obligation to the Belgian regulator, they will need a record of fees paid for services that have been provided during the claims process, and any associated VAT payments. They also need to be made available to the Belgian regulator including copies of invoices to meet audit obligations.

The current solution within the market has led to:

- poor controls at point of Expert fee submission
- poor data quality & unstructured VAT data
- reporting based on above poor controls & data quality
- duplicative & manual capture of invoices in Securestore

The reporting of data via ECF has been inaccurate, with substantial duplicate reverse charge VAT payments being due, with Carriers required to upload copies of invoices on to SecureStore for consumption by LIC.

GEMINI delivers a solution to correctly record and report on VAT on Expert fees and remove the need for Carriers to upload the invoices to SecureStore. GEMINI improves the validation of the Expert invoice at submission stage, with the Expert being guided within GEMINI via LIC agreed categorisations to deliver an accurate record of the correct VAT amount that can then flow into ECF.

Please find steps below on how to complete an invoice that falls under Lloyd’s Europe and Part VII.

Once you have been notified of a new instruction you will be provided with a link which will direct you into GEMINI and the applicable instruction. From there you can select ‘Manage Invoices’.

≡ Gemini [Experts] -

My Area
Company Instructions
Company Invoices
Admin
Help & Support
Invoices and Payments Pipeline

View Expert Appointment

Claim details

UCR / Claim Ref B56MT4566

UMR / Policy Ref B56MT4566

Loss Name COLLISION IRISH SEA

Loss Location United Kingdom

Date of Loss From Fri, 01 Jan 2016

Date of Loss To Sun, 01 Jan 2017

Created By Company /ABC Insurance Limited

Created By User ABC Insurance Limited

Comments -

Instruction Details

Expert Type Adjusting

Expert Sub Category 1st Party

Expert Role Supervisory

Expert Appointed By Carrier

Appointed By

Instruction Description -

Status Open

Date created Mon, 19 Apr 2021 12:48 pm

Instruction Duration to date 4 hours 42 minutes

Financial Details

Fee Reserve 5,000.00 USD

Fee Budget 0.00 USD

Total Payment (USD) 6,000.00

Erosion % Financials not set

Assign Expert

Company *
Test Company

Expert User
Please select...

Assign

Manage Invoices

Then select 'New Invoice'.

≡ Gemini [Experts] -

My Area
Company Instructions
Company Invoices
Admin
User Guide
Invoices and Payments Pipeline

All Invoices

Claim details

UCR / Claim Ref B5600MT4566

UMR / Policy Ref B5600MT4566

Loss Name Loss Name

Loss Location United Kingdom

Date of Loss From Thu, 14 May 2020

Date of Loss To -

Created By Company Managing Agent Company

Created By User Tom McArthur (tom.mcarthur@advent.claims)

Instruction details

Instruction Ref Instr-264

Assigned Expert -

Expert Type Adjusting

Expert Sub Category 1st Party

Instruction Description Test Description

Instruction Currency United Kingdom Pound (GBP)

Status Open

Date created Wed, 03 Jun 2020 09:54 am

Pending Invoices 0

New Invoice

Search Invoices ▾

Pending Invoices

Gemini Invoice Ref	Expert Invoice Ref	Currency	Total Invoice Amount	Status	Final?	Created By	Submitted By	Date / Time Submitted
No invoice available								

As the claim is for Lloyd's Europe and Part VII you will have additional items to complete

You will have to option to select whether the service carried out is for the Insured or the Insurer.

GEMINI Gemini [Experts] ▾

My Area
Company Instructions
Company Invoices
Admin
Help & Support
Invoices and Payments Pipeline

Add Invoice

UCR / Claim Ref
BLB103

Insured / Reinsured
Peter Pan

Loss Name
Loss name

Invoice Details

Expert Invoice Ref *

Invoice Description *

Currency *

Bank Account *

Created By
Clive Gallehawk

Date/Time Created
Wed, 24 Nov 2021 14:42 pm

Is this service for the Insured or the Insurer? * ☒ Insured ☐ Insurer

PDF Upload

To upload a file please select into the boxed area or drag and drop your file onto the page

If this is selected that the claim is for the insured, the user will be instructed to make the invoice out to the Insured.

GEMINI Gemini [Experts] ▾

My Area
Company Instructions
Company Invoices
Admin
Help & Support
Invoices and Payments Pipeline

Add Invoice

UCR / Claim Ref
BLB112

Insured / Reinsured
Peter Pan

Loss Name
Loss name

Invoice Details

Expert Invoice Ref *

Invoice Description *

Currency *

Bank Account *

Created By
Tom Test

Date/Time Created
Mon, 29 Nov 2021 07:46 am

Is this service for the Insured or the Insurer? * ☒ Insured ☐ Insurer

Please ensure your Uploaded Invoice is made out to the Insured.

PDF Upload

To upload a file please select into the boxed area or drag and drop your file onto the page

Drop files here to upload

File	Description *	Invoice File Type *

You will then be required to complete the TAX fields where this is applied. Once submitted this will be processed by the ECLIPTIC team.

If you are to select this invoice is for the insurer, you will be instructed to make this invoice out to Lloyd's Europe and the correct address is provided within the GEMINI system.

There will then be additional items to be completed dependant on the selection criteria of the claim.

1. The “Expert Based in Belgium?” is selected **Then** the invoice will default to Belgium’s Tax Rate (21%)
2. If neither are selected then the Expert will not be required to complete the TAX fields
3. **If:** The claim High-Level Class of Business (On Claim Object) is “Property D&F” OR “Property Treaty” **Then:** you will see the question - “Is the Property Immovable?”

If this is not selected **AND** the “Expert Based in Belgium?” is selected **Then** the invoice will default to Belgium’s Tax Rate (21%)

If this is not selected **AND** the “Expert Based in Belgium?” is not selected **Then** the Tax Fields are Hidden.

If this is selected **AND** the “Expert Based in Belgium?” is not selected **Then** the Tax Fields are Mandatory.

If this is selected **AND** the “Expert Based in Belgium?” is selected **Then** the Tax Fields are Mandatory.

4. **If:** The claim High-Level Class of Business is “Aviation” OR “Marine” **Then:** The invoice page will have a select to whether the invoice – “Is the claim related to an Aircraft or a Vessel?”

If this is not selected **AND** the “Based in Belgium?” is selected **Then** the Tax Fields are Mandatory – Defaulted to Belgium’s Tax Rate (21%)

If this is not selected **AND** the “Based in Belgium?” is not selected **Then** Tax Fields are Hidden.

8.4 How to search for an invoice

Within the GEMINI system you will have the ability to search for all your invoices, all company invoices (admin users only) and all invoices within one instruction. There will be various fields which you will be able to search by in the system.

You can search for your invoices via two pages:

- “My Area” > “My Invoices”
- “Company Invoices”

List of My Invoices

Search Invoices ^

Claim Ref	
GEMINI Instruction Ref	Instr
Invoice Batch Reference	IB
GEMINI Invoice Ref	
Expert Invoice Ref	
Total Invoice Amount	
Invoice Description	
Date Submitted From	dd/mm/yyyy
Date Submitted To	dd/mm/yyyy
Status	All
Final?	All

9 Reporting

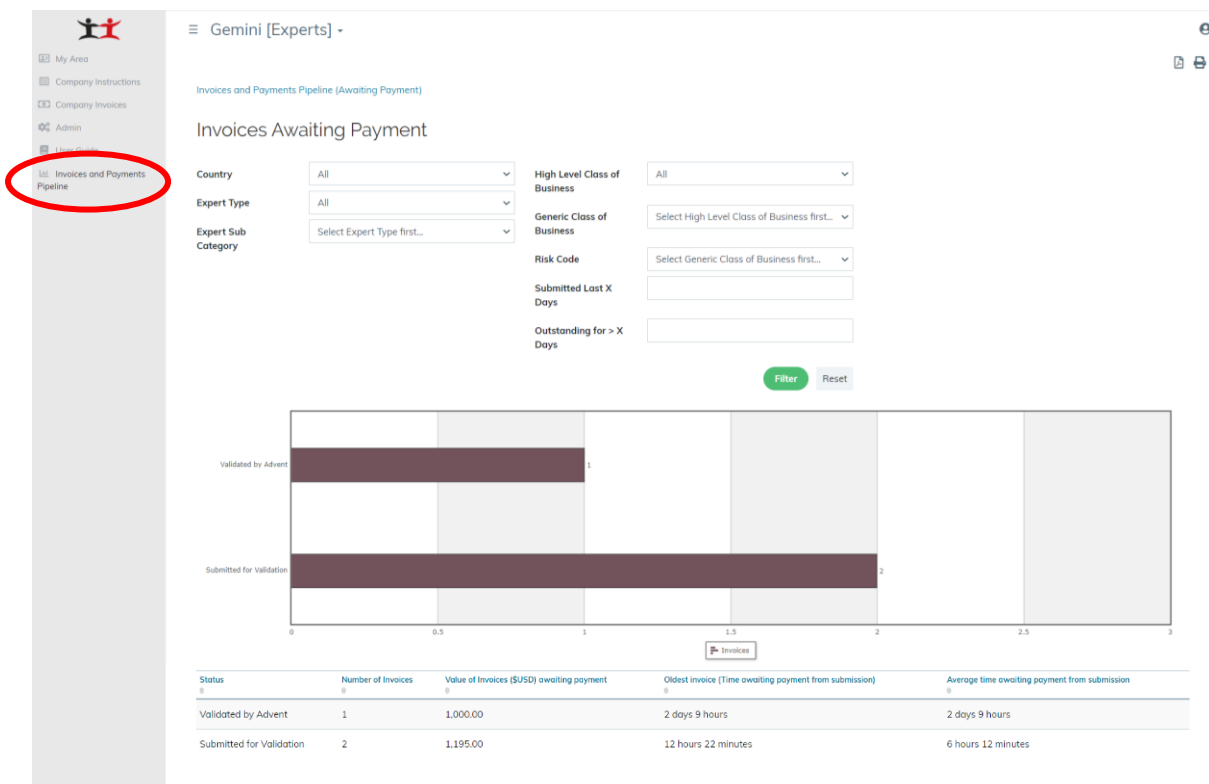
As an Expert user you will be able to see high level reports to show the number of invoices your company has at each stage of the payment process along with the value of those invoices.

The invoice has a total of 7 statuses within the system. These are:

1. Draft – Your invoice has been saved within the system but not yet submitted.
2. Submitted for Validation – ECLIPTIC are reviewing that you have uploaded the correct information in order for ECLIPTIC to submit this to the subscribed Market.
3. Validated by ECLIPTIC – ECLIPTIC have validated your invoice and your invoice has been passed to ECLIPTIC’s processing team.
4. Carrier Approval – Your invoice is waiting to be approved by the subscribing market.
5. Payment Processing – Your invoice has been approved by the subscribing market and your payment is being processed by Moneycorp

6. Paid – Your invoice has been paid
7. Queried – Your invoice has been queried by ECLIPTIC or the subscribing market

To see these reports, select 'Invoices and Payments Pipeline'. The user can use the filters to differ the reports



10 Carrier Onboarding

10.1 How to view Carriers who have been onboarded

The user can now see which Carriers have onboarded onto the GEMINI service and are able to see each Carrier by Bureau(x), Class of Business, go live date & any comments they wish to add.

You can view this by selecting the tab 'Carrier Onboarding'

Carrier	Bureau(s)	Class of Business	Go Live Date	Comments
Carrier 2022 1.0 V1	Lloyd's	Property Treaty, Casualty FinPro, Casualty Other, Accident & Health	10/11/2021	Test Comment
Carrier 2022 1.0 V2	Lloyd's, LUL, LIRMA	Property Treaty, Marine, Property (D&F), Energy, Accident & Health	05/04/2022	-