



ECLIPTIC



GEMINI

# Global Expert Management Initiative

## User Guide- Carrier



# User Manual Guide

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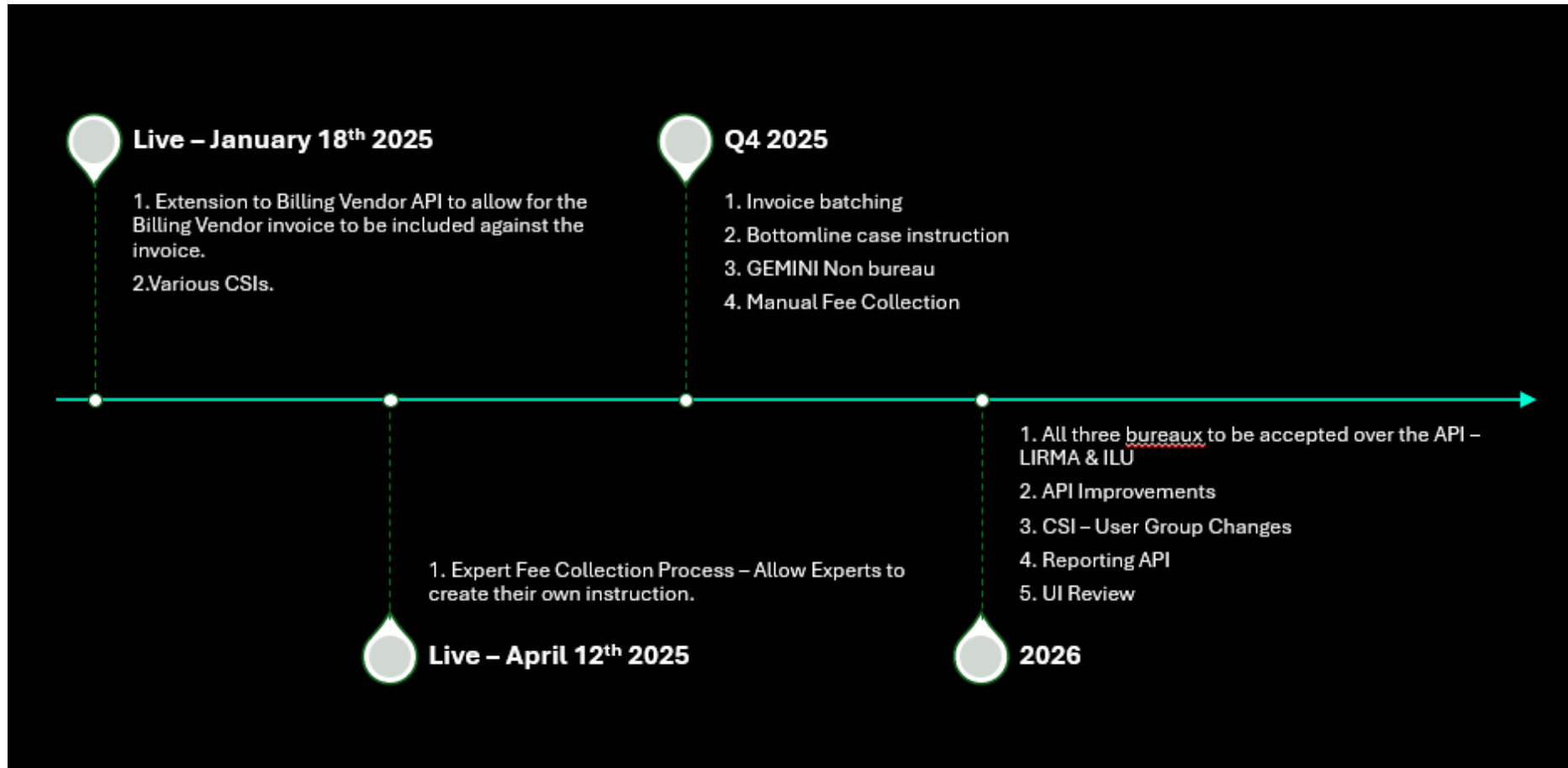
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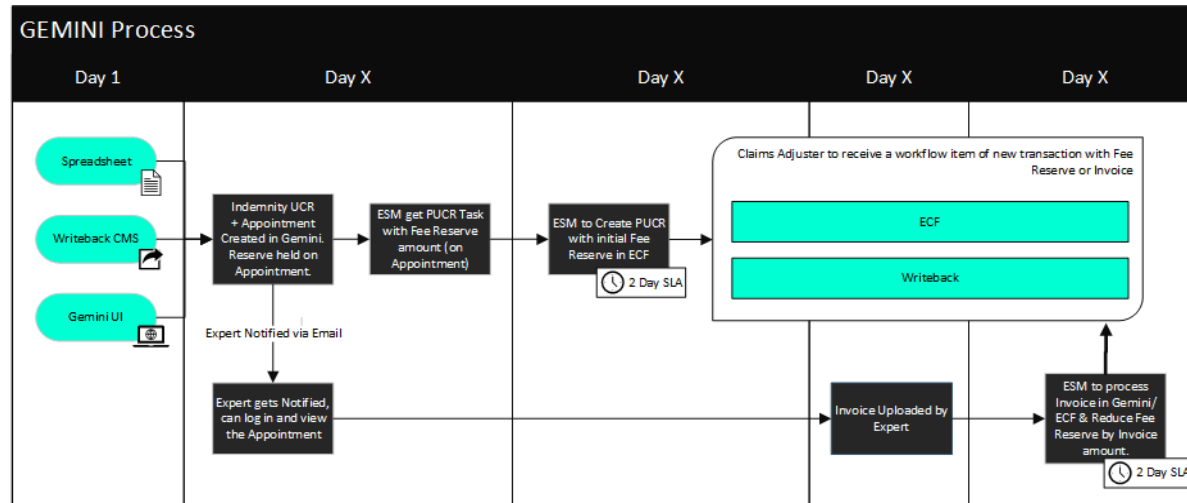


## 1.0 General Information

### 1.1 What does the GEMINI system cover?



## 1.2 The GEMINI Process



## 2.0 Accessing GEMINI

### 2.1 Logging in to GEMINI

Log into the London Markets Group Portal - <https://portal.londonmarketgroup.co.uk/#/applications>

Select the GEMINI tile

The screenshot shows the LIMOSS portal dashboard with a grid of application tiles. The 'Gemini' tile is circled in red. The tiles include:

- Delegated Data Manager**: Full production environment of Delegated Data Manager (DDM), integrated to SDC and MDM. Contact: DDM Service Portal, +44 (0)8000246089.
- Delegated Data Manager Training**: A training environment for Delegated Data Manager (DDM). Contact: LIMOSS Self-Service Portal, +44 (0) 207 100 5151.
- Devolved Admin Portal**: Self-service tool for Authorised Contacts. Contact: LIMOSS Service Desk, +44 (0) 207 100 5151.
- Dialogue**: A single, secure, independent platform for sending, receiving, negotiating, and responding to TCPRI enquiries. Contact: info@dxglobal.co.uk, N/A.
- Gemini** (circled in red): Global Expert Management and Payment System. Contact: Servicedesk@limoss.london, +44 (0) 207 100 5151.
- LIMOSS Academy**: Created to help support and facilitate the London Insurance Market. Contact: LIMOSS Service Desk, +44 (0) 207 100 5151.
- Market Business Glossary**: An application providing definitive data standards. Contact: LIMOSS Service Desk, +44 (0) 207 100 5151.
- LIMOSS Self-Service Portal**: Please click here to log a support ticket. Contact: servicedesk@limoss.london, +44 (0) 207 100 5151.
- Lloyd's DCOM (Delegated Contracting)**: Supporting coverholder onboarding. Contact: Market Support Centre, +44 (0) 20 7327 5350.
- Lloyd's Insights Hub**: The Insights Hub is the next generation data analysis platform. Contact: insightshub@lloyds.com, N/A.
- Lloyd's Market Support Centre (MSC)**: The Lloyd's Market Support Centre (MSC) is here to help users. Contact: Market Support Centre, +44 (0) 20 7327 5350.
- Secure Data Exchange**: SDE service provides functionality to securely exchange files. Contact: LIMOSS Service Desk, +44 (0) 207 100 5151.

Select 'Carrier Sign In'



### Non SSO Login

Sign in to your account

Username

Password

[Sign in](#)

[Password reset \(For non-SSO users\)](#)

**Notice:** This application uses cookies to ensure essential services work as intended. You are agreeing to this by signing in. Without cookies, this application will not function properly.

[Minimum requirements](#)

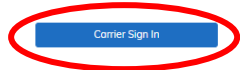
If you are a Carrier organisation, please click the "Carrier Log-in" button.

If you are a Claims Expert, please enter the username and password provided to you when registering for Gemini and click "Sign in".

If you have any problems logging-in, please contact the LIMOSS Service Desk [servicedesk@LIMOSS.London].

### Carrier Login

Sign in using LIMOSS Gateway



## 2.2 User Admin

This tab allows users with full permissions to access all the users within their Carrier organisation. Here they can add and edit users and update users permissions.

### 2.2.1 How to add a user

Select 'User Admin' -> 'Add New User'.

Name	Email Address	User Admin?	Assign to Panel?	Can Approve?				
Tom McArthur	tom.mcarthur@advent.claims	✓	✓	✓	User Details	Credentials	Permissions	Make Inactive

Fill in individual details and create their user.

The following permissions will allow the user access to:

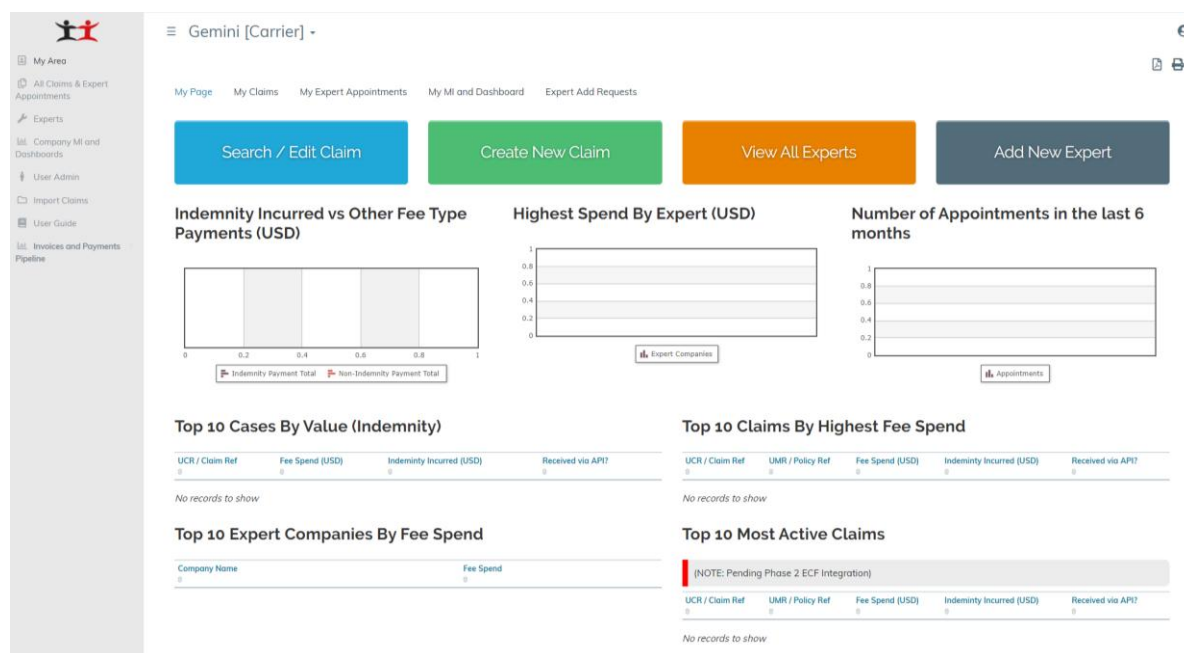
- Add/Edit Users - This will allow the user to add additional users within your company and change their permissions and details.
- Assign Expert Company to My Carrier Panel - This will allow the user to create, add and remove Expert organisations onto your company's panel/s.
- Expert Company Setup - This will allow the user to request the registration of a new Expert company directly from ECLIPTIC administration, without the need for any internal Carrier approval.
- Expert Company Assignment:
  - All Expert Companies - This will allow the user to appoint all Experts within GEMINI.
  - My Carrier Expert Companies – This will only allow the user to appoint Experts that have been previously used within their company.
  - My Carrier Panel Expert Companies – This will only allow the user to appoint Experts listed on their company panel.
- Claims & Instructions Access - This will allow the user to have access to either:
  - All Carrier Claims & Instructions – would be the default option, as allows users to see all claims within their company, and access to the private area(s) which holds any uploaded documents (such as terms of engagement or fee cards).
  - My Claims and Instructions (inc. Contracts) - Only their personal claims & instructions including access to the private area(s). This will not allow the user access to claims where they are not involved.
  - My Claims and Instructions (exc. Contracts) - Only their personal claims & instructions excluding access to the private area(s). This will not allow the user access to claims where they are not involved with.

## 3.0 Tab Summary

### 3.1 My Area

When a user logs in to GEMINI, they will be presented with 'My Area' as their default screen. This page provides details on the claims, appointments and Experts that you are directly involved in, and reports and dashboards for activity on claims and instructions.

Additionally, you will be able to further analyse Expert use and spend. GEMINI converts all spend data into a base currency of US dollars to ensure consistency of data analysis.



This page displays summary charts for the following:

1. Fee spend (\$) by Payment Type, i.e. adjuster fees spend, lawyer fee spend etc.
2. Indemnity paid vs Other Fee Type payments (\$)
3. Expert organisations by highest fee spend

The user will also see their top 10 cases by:

1. Value (indemnity)
2. Highest Fee Spend on a claim
3. Highest Fee Spend on an Expert
4. Most active claims (based on ECF transactions, phase 2 delivery)

Users will also be able to go directly to the most commonly used functions from this page namely:

- **Search/Edit Claims** - Fast path to the 'My Claims' area
- **Create New Claim** - Fast path to manually adding a new claim to GEMINI
- **View All Experts** – Fast path to Expert search facility

- **Add New Expert** - Fast path to Experts tab to request registration of a new Expert within GEMINI

### 3.2 All Claims & Expert Companies

This tab provides an overview of all claims and associated Expert appointments related to your Carrier organisation (subject to access rights). If the user has been given permissions to access this tab, they will have the ability to view, edit and assign/reassign claims to other users within the company.

Within this tab it also allows the user to search/filter claims by a range of criteria shown on the screen layout below.

The screenshot displays the Gemini [Carrier] - All Claims & Expert Companies interface. The interface includes a navigation menu on the left with options like My Area, All Claims & Expert Appointments, Experts, Company M and Dashboards, User Admin, Import Claims, User Guide, and Invoices and Payments Pipeline. The main content area features a header with the Gemini logo and carrier name, and a main content area with filter options and a table of claims. The filter options include UCR / Claim Ref, UMR / Policy Ref, Insured / Reinsured, Loss Name, Loss Location, High Level Class of Business, Generic Class of Business, Lead Adjuster, and Handler. The table columns include UCR / Claim Ref, UMR / Policy Ref, Insured / Reinsured, Date of Loss From, Loss Name, Loss Location, Erosion %, Instruction count, Lead Adjuster, Handler, Claim Status, and Received via API?. The interface also includes a '+ Add New Claim' button and a 'Filter Claims' section with various input fields and dropdown menus.

### 3.3 Experts

This tab allows the user to search, review, create and manage Experts that have been registered on the GEMINI platform. It also allows users to create their own panels of Experts including private areas (between individual Carriers and Expert organisations to manage documents, contracts, due diligence and SLA reporting).

Company Name	Locations covered (Company)	Branch/HQ Name	HQ or Branch	On My Panel	Expert Type	Expert SubCategory	Countries Covered	Cities Covered	DD up to date?	DD Status	Intention to Audit (click to view)
ABC Company	131	ABC Company - London	Branch	✗	-	-	0	0	✗	Pending	✗
Cheapside Adjusters Ltd	241	Cheapside Adjusters Ltd - London	Branch	✗	-	-	0	0	✗	Pending	✗

### 3.4 Company MI and Dashboards

This tab allows the user to review and filter a variety of pre-set reports on all claims, appointments and fees for their Carrier organisation (subject to permission levels provided by their admin user). This includes analysis on claims where the Carrier acts as either lead or follow.

Please find attachment with full listing of reports



Carrier Reports - GEMINI.pdf

### 3.5 User Admin

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

- User Details – to update the users name, email phone number
- Credentials – to update the user’s username, and the ability to unlock a user who has locked their account
- Permissions – the user’s authority within GEMINI, as detailed in section 4.5.1
- Active/Inactive status – to restrict a user’s access to the system



### 3.6 Invoices and Payments Pipeline

This tab will show you high level payment reports for:

- All outstanding invoices within the payment process, the status their showing and the value of total invoices at each status
- All paid invoice and show the maximum, minimum and average time it has taken to have an invoice paid

Please find attachment with full listing of reports



Carrier Reports - GEMINI.pdf

## 4.0 Experts, Private Area & Panel

### 4.1 Experts

This tab allows the user to search, review, create and manage Experts that have been registered on the GEMINI platform. It also allows users to create their own panels of Experts including a private area (between individual Carriers and Expert organisations) to manage documents, contracts and SLA reporting. Depending on the user’s permissions, they may have access to the private area and management of the company’s panels.

#### 4.1.1 4.1.1 How to view the Expert Location Map

On the “View All” page, you can click the “Location Map” dropdown arrow to view the Expert Location Map. There are two note disclaimers associated with the map:

*Note: If an Expert Organisation has not provided a valid address, they will not appear on this map.*

*Note: If the expert has provided multiple branch addresses they will appear multiple time in the map, however if they have only provided a single address they will only appear once.*

The expert organisation branch address determines where they will be pinpointed on this map. If a valid UK postcode is provided, this pinpoint will be applied automatically. If an address outside of the UK is provided, this will be pinpointed onto the map manually by the GEMINI service desk team.

## Location Map

Note: If an Expert Organisation has not provided a valid address, they will not appear on this map.  
Note: If the expert has provided multiple branch addresses they will appear multiple times on the map; however if they have only provided a single address they will only appear once.



## 4.2 How to search for an Expert

By selecting the Experts tab, you have the option of searching by:

- View All – All Experts available within the system.
- View Appointed – All Experts that have been appointed by your company on any claim.

Within these searches, there are a range of filter/search options to assist you in finding the Expert(s) required.

Company Name	Locations covered (Company)	Branch/HQ Name	HQ or Branch	On My Panel	Expert Type	Expert SubCategory	Countries Covered	Cities Covered	DD up to date?	DD Status	Intention to Audit (click to view)
ABC Company	131	ABC Company - London	Branch	✗	-	-	0	0	✗	Pending	✗
Cheapside Adjusters Ltd	241	Cheapside Adjusters Ltd - London	Branch	✗	-	-	0	0	✗	Pending	✗

### 4.2.1 How to view an Expert's Due Diligence

Each Expert company is requested to complete a due diligence exercise which will be visible to all Carriers within GEMINI. Use the search filters to search for an Expert and then select their name within the list on the left-hand side.

Managing Agent Company

View All Requests

Request to add an Expert Organisation

Expert Organisation: ABC

Country/Territory: All

City: Select Country/Territory first...

High Level Class of Business: All

Filter

Reset

Company Name	Locations covered (Company)	Branch/HQ Name	HQ or Branch	On My Panel	Expert Type	Expert SubCategory	Countries Covered	Cities Covered	DD up to date?	DD Status	Intention to Audit (click to view)
ABC Company	131	ABC Company - London	Branch	✗	-	-	0	0	✗	Pending	✗

Select 'View Company Profile'.

ABC Company - London

Company Profile

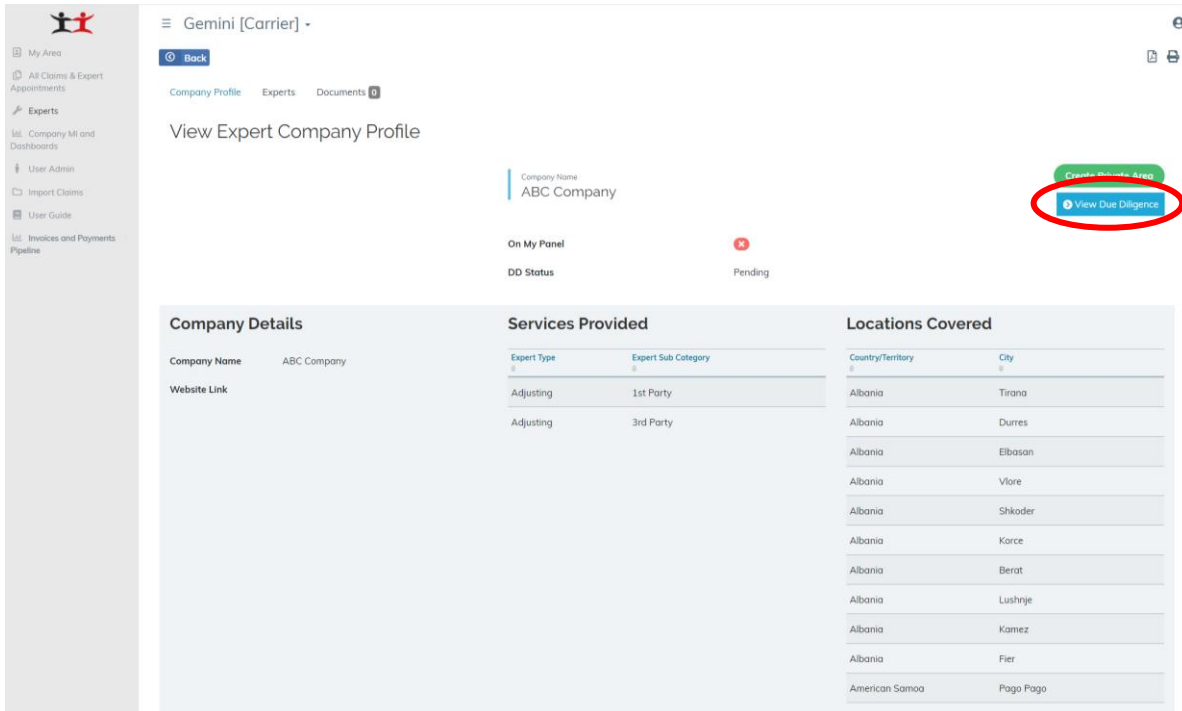
View Company Profile

On My Panel: ✗

DD Status: Pending

Details		Services provided			Locations Covered	
Company Name	Branch / HQ	Expert Type	Expert Sub Category	ID	Country/Territory	City
ABC Company	ABC Company - London				United Kingdom	London
Address 1	-					
Address 2	-					
Postcode	-					
Website Link	-					
Comments	-					

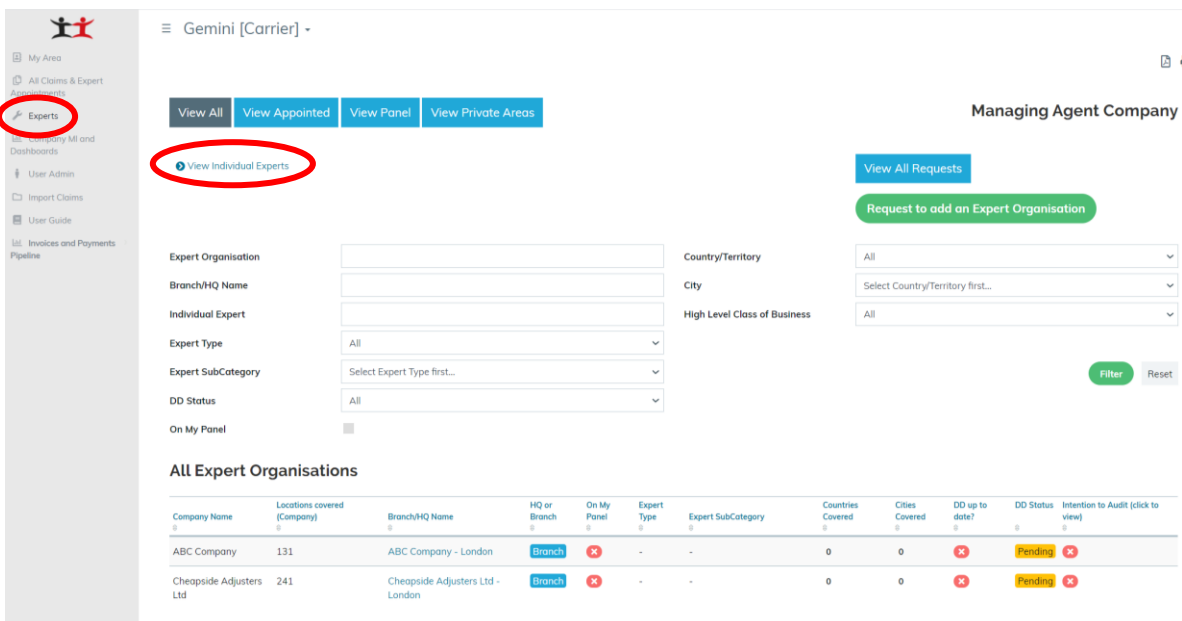
You can then view the company due diligence by selecting 'View Due Diligence'.



The user will have full access to all answers and attaching documents.

#### 4.3 How to search for an individual within an Expert organisation

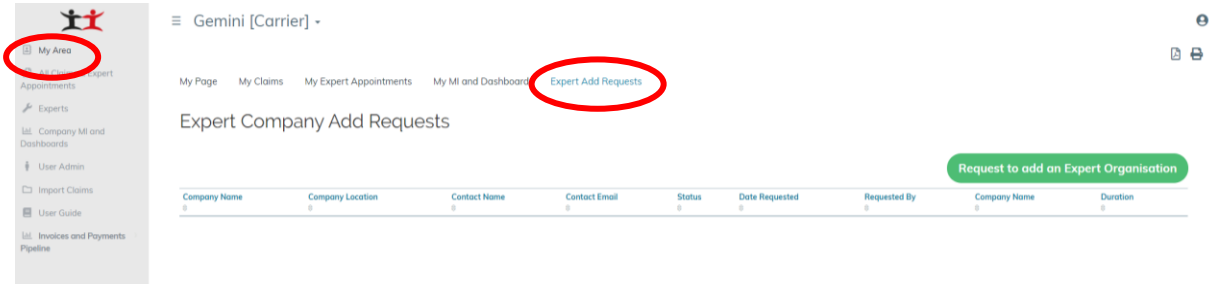
Functionality exists within GEMINI to search for an individual within an Expert company. To search for an individual Expert, select 'Experts' and then 'View Individual Experts'. The user can then filter by individual Expert name.



## 4.4 Expert Company Add Requests

This tab allows the user to request and track the addition of new Experts to the GEMINI platform. Please note that the ability to request and authorise the addition of Experts is controlled by admin users within each organisation.

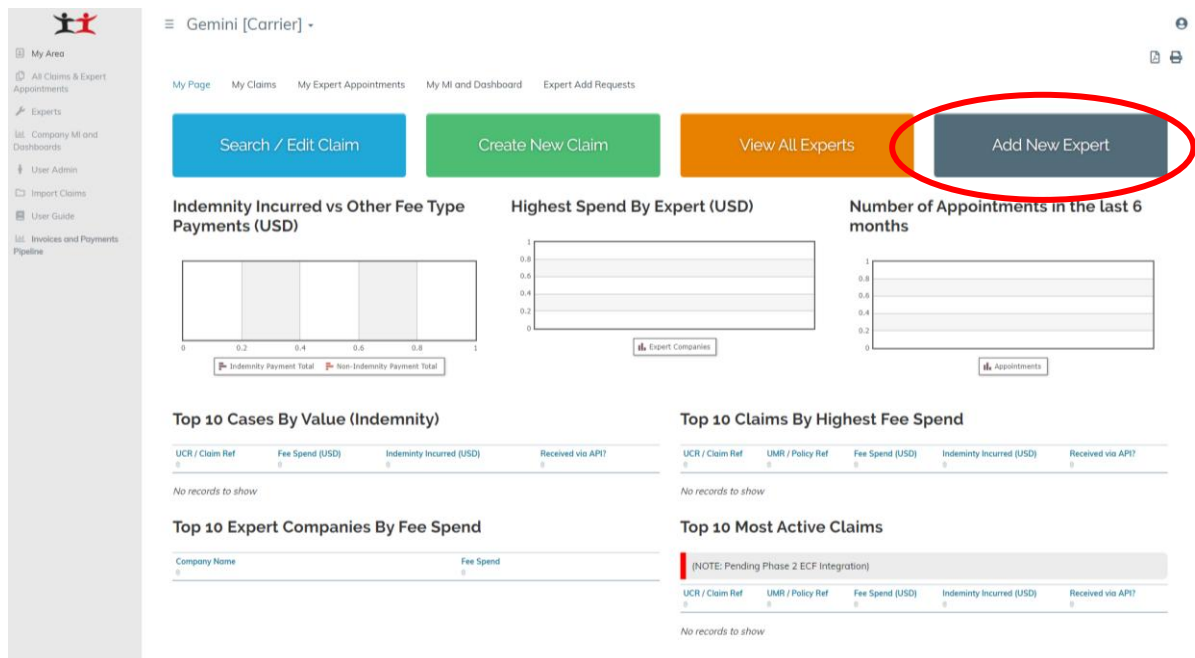
Select 'My Area' -> 'Expert Add Request'



The screenshot shows the Gemini [Carrier] dashboard. The left-hand navigation menu has 'My Area' circled in red. The main navigation bar includes 'My Page', 'My Claims', 'My Expert Appointments', 'My MI and Dashboard', and 'Expert Add Requests', with the last one circled in red. The page title is 'Expert Company Add Requests'. A green button labeled 'Request to add an Expert Organisation' is visible. Below it is a table with columns: Company Name, Company Location, Contact Name, Contact Email, Status, Date Requested, Requested By, Company Name, and Duration.

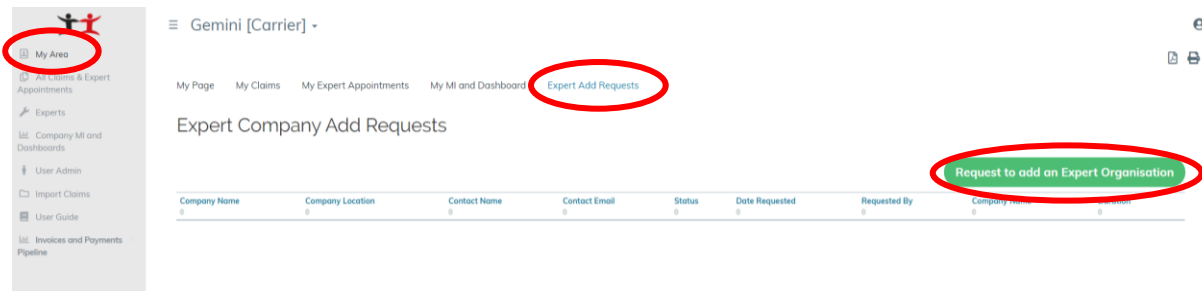
### 4.4.1 How to request an Expert

There are two ways to request a new Expert. Firstly, the user can select 'Add New Expert' from the home page.



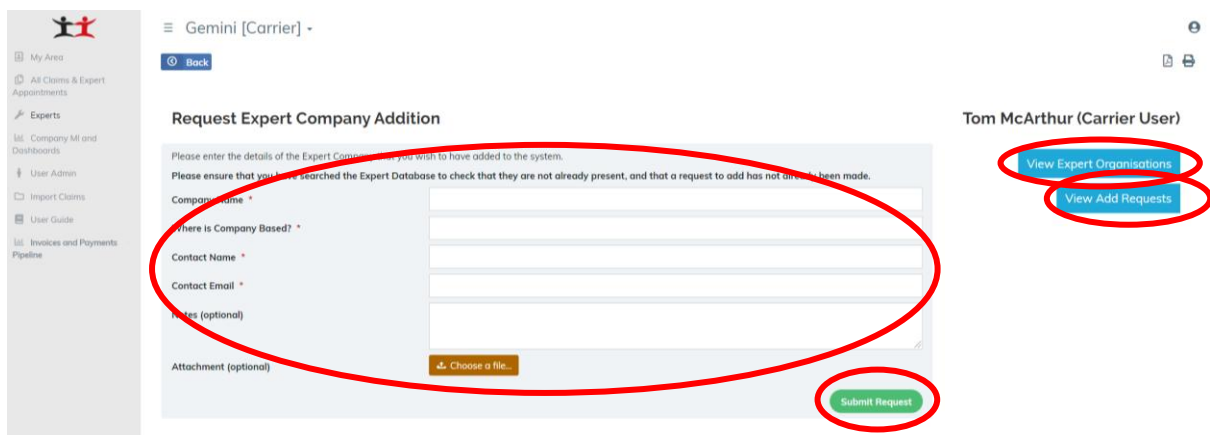
The screenshot shows the Gemini [Carrier] dashboard home page. The left-hand navigation menu has 'My Area' circled in red. The main navigation bar includes 'My Page', 'My Claims', 'My Expert Appointments', 'My MI and Dashboard', and 'Expert Add Requests'. Below the navigation bar are four buttons: 'Search / Edit Claim' (blue), 'Create New Claim' (green), 'View All Experts' (orange), and 'Add New Expert' (dark grey), with the last one circled in red. The dashboard features three charts: 'Indemnity Incurred vs Other Fee Type Payments (USD)', 'Highest Spend By Expert (USD)', and 'Number of Appointments in the last 6 months'. Below the charts are two tables: 'Top 10 Cases By Value (Indemnity)' and 'Top 10 Claims By Highest Fee Spend'. At the bottom, there are two more tables: 'Top 10 Expert Companies By Fee Spend' and 'Top 10 Most Active Claims'.

Or select 'My Area' then 'Expert Add Requests' and then 'Request to add an Expert Organisation'.



Once you select into 'Request to add an Expert Organisation' you will have the option to check whether the Expert you are requesting is already in the system or has been requested by another colleague. This can be done by selecting 'View Expert Organisations' as highlighted below. If the Expert is still not within the system you can enter in their company details and click 'Submit Request'.

*Please note: Depending on your permission rights, the request may go to an admin user within your organisation before being released to ECLIPTIC. All admin users will receive an email from the system to notify them that an Expert is needing approval. If you click on 'View Add Requests', you will be able to see the status of the Expert registration request. 'Needs Approval' infers that the request firstly has to be approved by an admin user within you company, whereas 'Requested' infers the request is with ECLIPTIC for consideration.*



ECLIPTIC will run a check to see if they already exist within the system. Once ECLIPTIC register them on the system the Expert will receive joining instructions and login credentials to access GEMINI and complete their landing page and due diligence submission. The user who requested the Expert will receive an automated email to confirm that the Expert has been registered or rejected.

#### 4.5 Private Area

A private area function has been created to allow for a Carrier and an Expert to share documents, notes, key contacts, SLA and audit details without them being visible to the rest of the market. The private area can only be seen by your company and the Expert company chosen. This area can only be created by the Carrier.

### 4.5.1 How to create a private area

To create your private area, select into the 'Experts' tab. The user can then search for an Expert using the search filters and then select into the chosen Expert by clicking their name on the left-hand side.

The screenshot shows the Gemini [Carrier] interface. The sidebar on the left has the 'Experts' tab selected. The main content area is titled 'Managing Agent Company' and contains search filters for 'Expert Organisation' (set to 'ABC'), 'Country/Territory', 'City', 'Expert Type', 'Expert SubCategory', 'DD Status', and 'On My Panel'. Below the filters is a table titled 'All Expert Organisations' with the following data:

Company Name	Locations covered (Company)	Branch/HQ Name	HQ or Branch	On My Panel	Expert Type	Expert SubCategory	Countries Covered	Cities Covered	DD up to date?	DD Status	Intention to Audit (click to view)
ABC Company	131	ABC Company - London	branch	✗	-	-	0	0	✗	Pending	✗

Once you have selected into that Expert select 'Create Private Area'.

The screenshot shows the Gemini [Carrier] interface for the 'ABC Company - London' profile. The 'Experts' tab is selected in the sidebar. The main content area shows the company profile with a 'View Company Profile' button and a 'Create Private Area' button highlighted in a red circle. Below the profile are sections for 'Details', 'Services provided', and 'Locations Covered'.

Details	Services provided	Locations Covered																								
<table border="1"><tr><td>Company Name</td><td>ABC Company</td></tr><tr><td>Branch / HQ</td><td>ABC Company - London</td></tr><tr><td>Address 1</td><td>-</td></tr><tr><td>Address 2</td><td>-</td></tr><tr><td>Postcode</td><td>-</td></tr><tr><td>Website Link</td><td>-</td></tr><tr><td>Comments</td><td>-</td></tr></table>	Company Name	ABC Company	Branch / HQ	ABC Company - London	Address 1	-	Address 2	-	Postcode	-	Website Link	-	Comments	-	<table border="1"><thead><tr><th>Expert Type</th><th>Expert Sub Category</th><th>ID</th></tr></thead><tbody><tr><td>-</td><td>-</td><td>-</td></tr></tbody></table>	Expert Type	Expert Sub Category	ID	-	-	-	<table border="1"><thead><tr><th>Country/Territory</th><th>City</th></tr></thead><tbody><tr><td>United Kingdom</td><td>London</td></tr></tbody></table>	Country/Territory	City	United Kingdom	London
Company Name	ABC Company																									
Branch / HQ	ABC Company - London																									
Address 1	-																									
Address 2	-																									
Postcode	-																									
Website Link	-																									
Comments	-																									
Expert Type	Expert Sub Category	ID																								
-	-	-																								
Country/Territory	City																									
United Kingdom	London																									

You will then have access to the 'View Private Area' button. This will bring you to your private area.

Gemini [Carrier] -

ABC Company - London

Company Profile Experts Documents 0

Expert Organization  
ABC Company - London

View Company Profile

On My Panel ✖

DD Status Pending

View Private Area

Details		Services provided			Locations Covered	
Company Name	ABC Company	Expert Type	Expert Sub Category	ID	Country/Territory	City
Branch / HQ	ABC Company - London				United Kingdom	London
Address 1	-					
Address 2	-					
Postcode	-					
Website Link	-					
Comments	-					

The private area allows a Carrier to share documents and data in confidence, with access only given to users within the Carrier company.

This includes areas to upload:

- General documents
- Notes
- Details of any proposed audits
- Key contacts
- SLA reports

Click 'Save Changes' to complete your private area.

**Private Area - ABC Company - London**

**Documents**

File	Document Type	Description	Created By: Carrier	Created By: Expert	Date created
No records to show					

**Notes**

Note	Created By: Carrier	Created By: Expert	Date created
No records to show			

**Audit Records**

It Date To	Next Proposed Audit Date	Audit Outcome	Comments(Auditing Carrier)	Audit Complete	Add new
No records to show, please add an SLA					

**SLA**

SLA Type	Reporting Period	Active/Inactive	Number of Reports (Click To View)	Created By	Targets Set?
No records to show, please add an SLA					

**Contact - Carrier**

Name:   
 Email:   
 Mobile:   
 Landline:

**Contact - Expert**

Name:   
 Email:   
 Mobile:   
 Landline:

**Save changes**

#### 4.5.2 How to access all private areas

To view all private areas, select 'Experts' then 'View Private Areas'.

**Experts**

**View All** **View Appointed** **View Panel** **View Private Areas**

Expert Organisation:   
 Expert Contact:   
 Our Contact:

**Filter** **Reset**

**Organisations with Private Areas**

Private Area	Expert Organisation	Expert Contact	Our Contact	Documents	Notes (carrier notes)	Date created(carrier expert)
<b>Private Area</b>	ABC Company - London	-	-	0	0	Wed, 03 Jun 2020 08:36 am

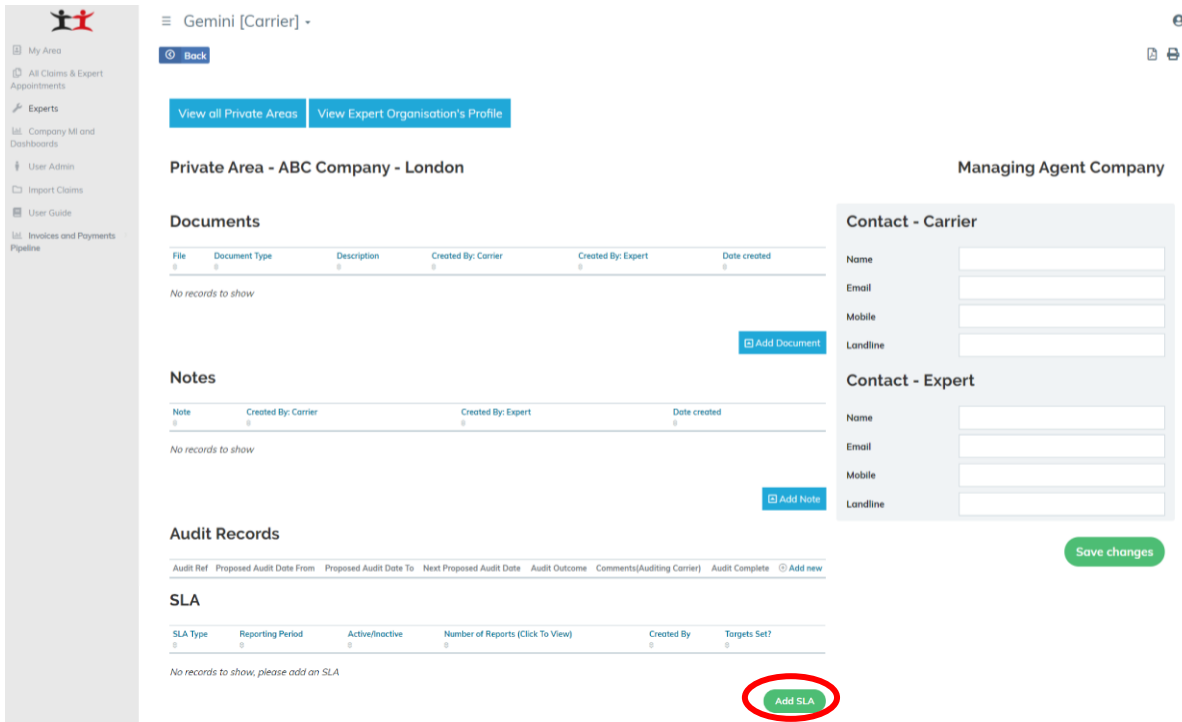
This will show all Experts within the system which you have created a private area with. You can gain access by clicking 'Private Area'.

**Private Area**

Private Area	Expert Organisation	Expert Contact	Our Contact	Documents	Notes (carrier notes)	Date created(carrier expert)
<b>Private Area</b>	ABC Company - London	-	-	0	0	Wed, 03 Jun 2020 08:36 am

### 4.5.3 How to add an SLA request for an Expert

Select into the private area of an Expert and then select 'Add SLA'.



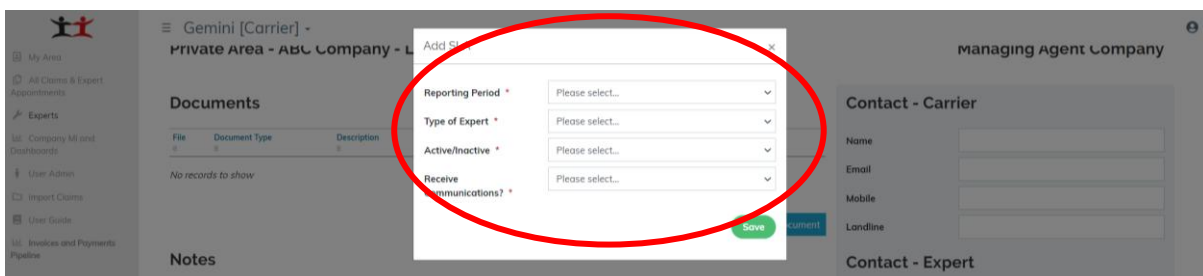
Then choose from the drop downs:

Reporting Period – Whether you want the Expert to report monthly or quarterly.

Type of Expert – Which SLA report to produce.

Active/Inactive – Whether you want to make this SLA reporting requirement active or inactive.

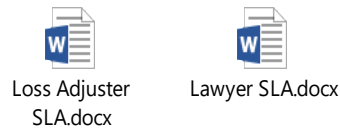
Receive Communications – Whether you want to receive notifications or not when an Expert submits an SLA return.



Once you have saved changes you can set SLA targets for reporting. If you have not set any SLA targets the system will show a warning message. This will direct you to complete your SLA targets, so the registered Expert can complete their return at the end of the chosen month or quarter. To do this, select 'Update Targets' and complete the SLA report.

The screenshot shows the Gemini [Carrier] private area interface. It includes a sidebar with navigation options like 'My Area', 'All Claims & Expert Appointments', 'Experts', 'Company Ml and Dashboards', 'User Admin', 'Import Claims', 'User Guide', and 'Invoices and Payments Pipeline'. The main content area is titled 'Private Area - ABC Company - London' and contains sections for 'Documents', 'Notes', 'Audit Records', and 'SLA'. The 'SLA' section has a table with columns: SLA Type, Reporting Period, Active/Inactive, Number of Reports (Click To View), Created By, and Targets Set?. The 'Loss Adjuster' row is highlighted in red, and the 'Update Targets' button is circled in red. To the right, there are forms for 'Managing Agent Company' and 'Contact - Carrier' and 'Contact - Expert' with fields for Name, Email, Mobile, and Landline, and a 'Save changes' button.

The embedded documents below list both the lawyer and adjuster SLA metrics held with the system.



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

Once the SLA report has been completed by the Expert an email notification will be sent to the contact saved within the private area for the Carrier. To View this report, select into the applicable private area and select the number under column 'Number of Reports'

The screenshot shows the Gemini [Carrier] private area dashboard. The page is titled "Private Area - ABC Company - London" and "Managing Agent Company". It features several sections:

- Documents:** A table with columns: File, Document Type, Description, Created By: Carrier, Created By: Expert, Date created. Below the table is a "No records to show" message and an "Add Document" button.
- Notes:** A table with columns: Note, Created By: Carrier, Created By: Expert, Date created. Below the table is a "No records to show" message and an "Add Note" button.
- Audit Records:** A table with columns: Audit Ref, Proposed Audit Date From, Proposed Audit Date To, Next Proposed Audit Date, Audit Outcome, Comments(Auditing Carrier), Audit Complete, Add new.
- SLA:** A table with columns: SLA Type, Reporting Period, Active/Inactive, Number of Reports (Click To View), Created By, Targets Set?. The "Number of Reports" column for the "Loss Adjuster" row has a value of "1" circled in red. Below the table are "Update Targets" and "Edit" buttons.

On the right side, there are two contact forms: "Contact - Carrier" and "Contact - Expert", each with fields for Name, Email, Mobile, and Landline. A "Save changes" button is located below the "Contact - Expert" form.

This will show the user all SLA reports submitted by the registered Expert. The user can select into any report by selecting 'View Report'. This will show them the full report and whether any SLA has been breached. The Expert is required to provide an explanation for any breach of SLA.

The screenshot shows the Gemini [Carrier] private area dashboard with a "View Report List (Popup)" window open. The popup window has a table with the following data:

SLA Report AutoRef	Report Status	Date Last Modified	View Report
SLAREP881	Complete	Fri, 23 Nov 2018 09:44 am	View Report

The "View Report" button in the popup is circled in red. The background dashboard shows the "Private Area - Test Adjuster" section.

#### 4.5.4 How to add Audit Records

GEMINI can be used to identify proposed Expert audits and track the completion of those audits. To enter a proposed or completed audit into the system, select into your private area (shown above) then select 'Add new'.

Gemini [Carrier] -

Back

View all Private Areas View Expert Organisation's Profile

Private Area - ABC Company - London

Managing Agent Company

Documents

File	Document Type	Description	Created By: Carrier	Created By: Expert	Date created
No records to show					

Add Document

Notes

Note	Created By: Carrier	Created By: Expert	Date created
No records to show			

Add Note

Audit Records

Audit Ref	Proposed Audit Date From	Proposed Audit Date To	Next Proposed Audit Date	Audit Outcome	Comments(Auditing Carrier)	Audit Complete	Add new
No records to show							

Add new

Save changes

SLA

SLA Type	Reporting Period	Active/Inactive	Number of Reports (Click To View)	Created By	Targets Set?
Loss Adjuster	Quarterly	Active	0	Tom McArthur	Yes

Update Targets Edit

The user will then have to fill in required information about the audit which will be taking place, then click 'Save changes'.

Gemini [Carrier] -

Back

View all Private Areas View Expert Organisation's Profile

Private Area - ABC Company - London

Managing Agent Company

Documents

File	Document Type	Description	Created By: Carrier	Created By: Expert	Date created
No records to show					

Add Document

Notes

Note	Created By: Carrier	Created By: Expert	Date created
No records to show			

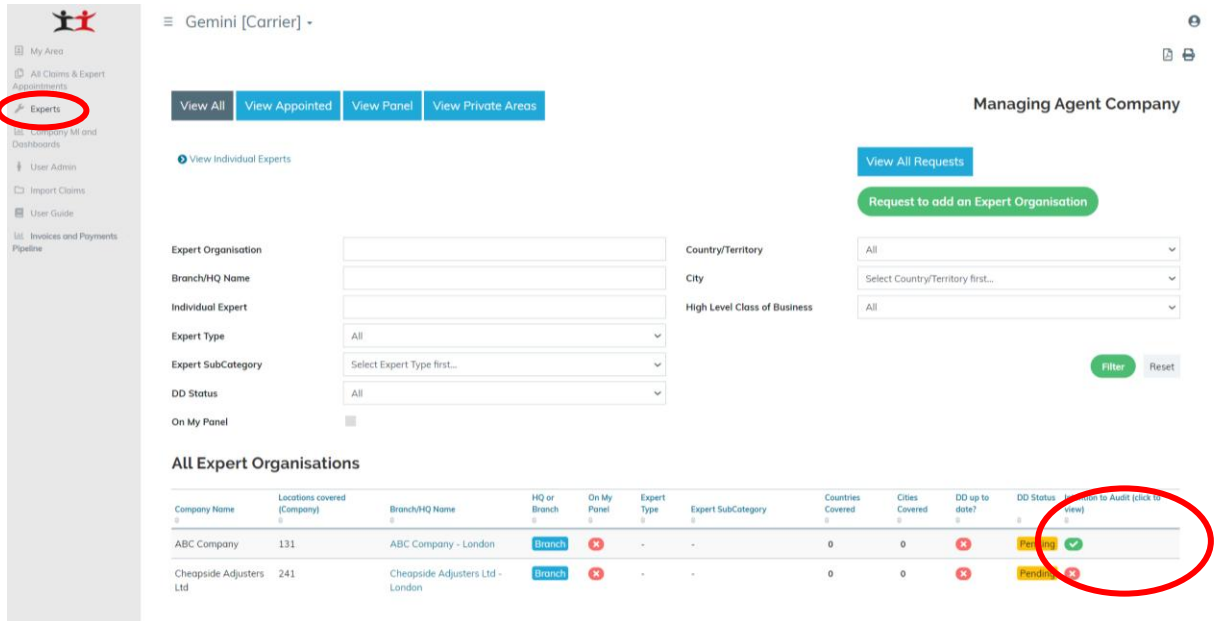
Add Note

Audit Records

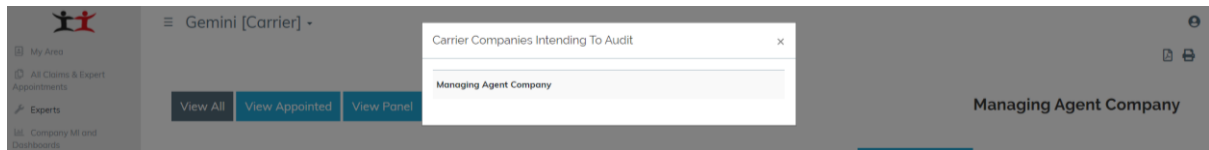
Audit Ref	Proposed Audit Date From	Proposed Audit Date To	Next Proposed Audit Date	Audit Outcome	Comments(Auditing Carrier)	Audit Complete	Add new
	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy			No	

Save changes

Carriers can have view of all other Carriers that propose an audit on an Expert. They can do this by selecting into Experts. On the right-hand side of the screen filter by 'Intention to Audit'. Select the tick for the Expert.

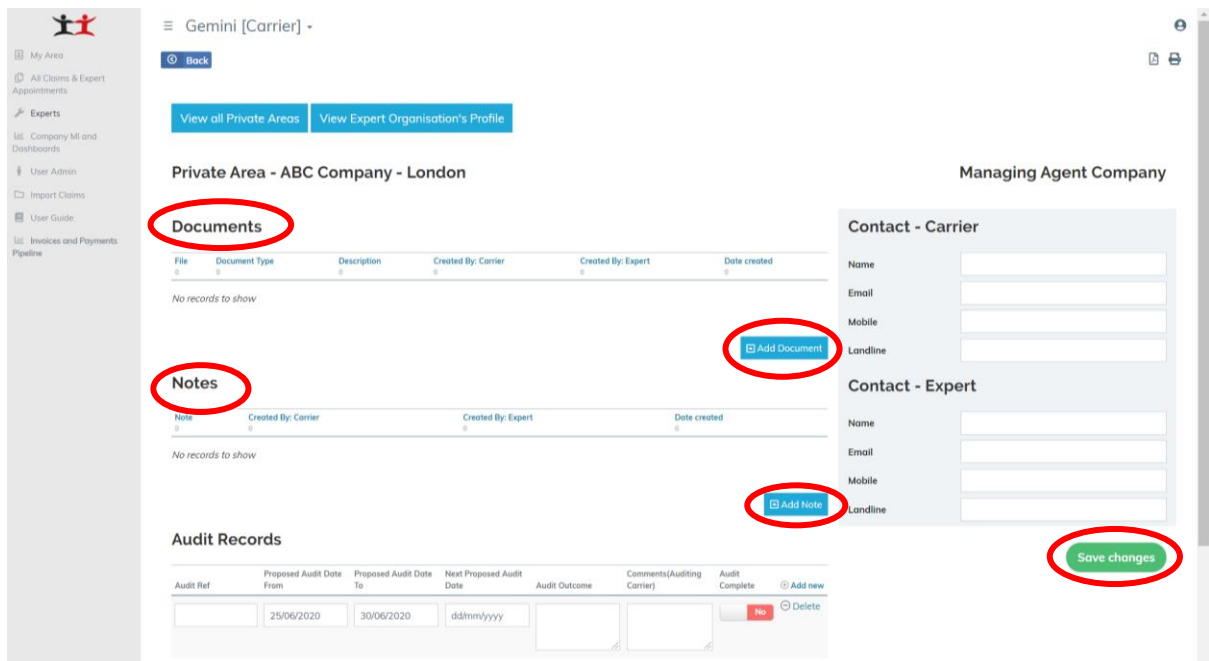


This will then direct forward a page to show you a list of all Carriers that propose to carry out an audit for that Expert. Whether you make contact to arrange a shared audit is up to you.



#### 4.5.5 How to add Documents and Notes

Within the private area select 'Add Document' or 'Add Note', complete all mandatory fields then click 'Save changes'.

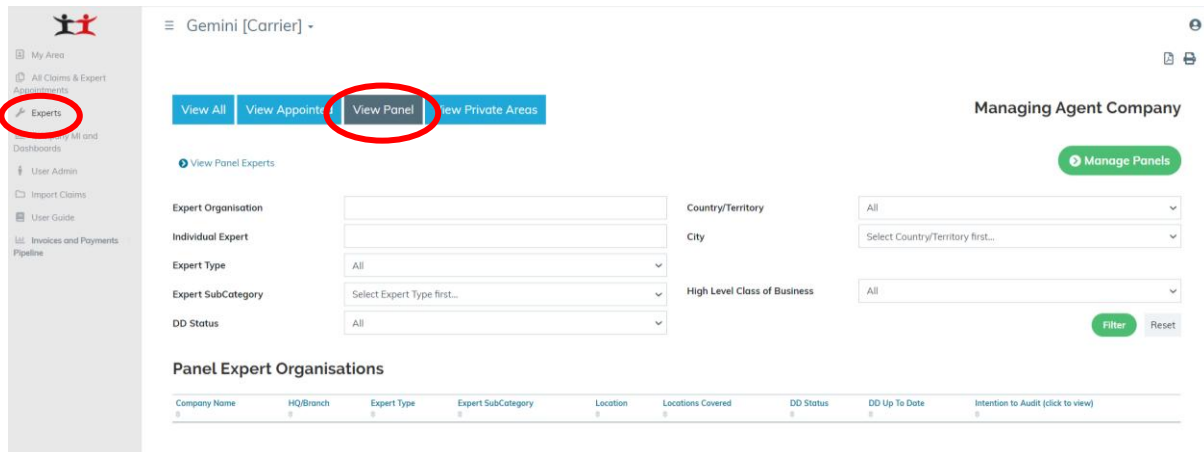


## 4.6 My Panel

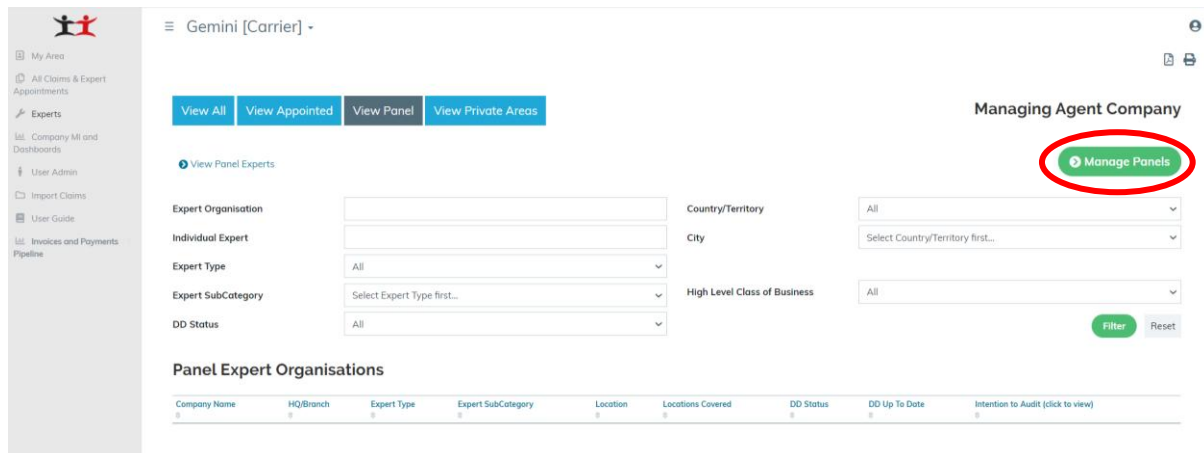
Each Carrier will be able to create and maintain any number of Expert panels within the system. For you to add an Expert to your panel the Expert must be registered on the system – see section 6.4.1

### 4.6.1 How to create a panel

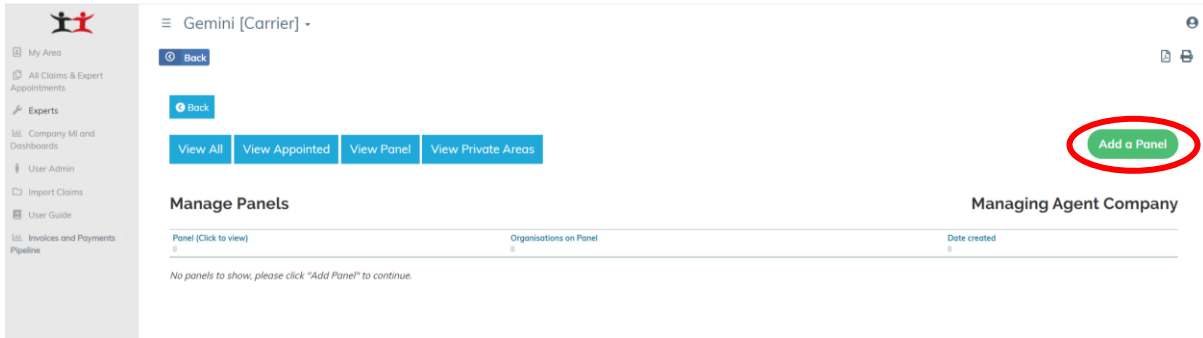
To create a panel select into 'Experts' then 'View Panels' – This will give the user a view of all Experts on all panels.



To create a panel or add to your current panels select 'Manage Panels'.



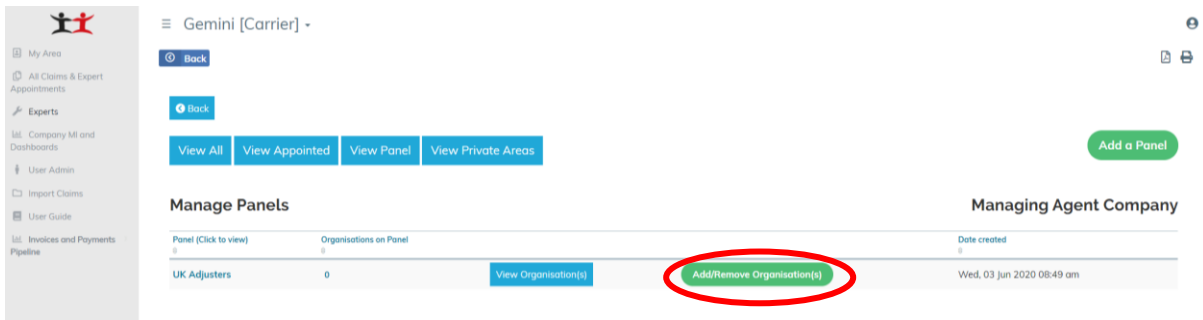
You will now be able to view all existing panels. The user will be able to add & remove Experts from existing panels and create new panels. To create a new panel, click 'Add a Panel'.



The system will then direct you to a page where you will be asked to name your panel. Once you name your panel you will then be able to save it to the system by clicking 'Save'.



The system will take you back into the manage panels page where you will be able to add an Expert(s) company to the panel you have named. To do this select 'Add/Remove Organisation'.



You will now be able to search and select Expert organisations to join your panel by clicking 'Add to Panel'.

**Add Organisation(s) to UK Adjusters**

**Filter Expert Organisations**

Expert Organisation: All  
 HQ or Branch: All  
 HQ/Branch Name:   
 Type of Expert: All  
 Individual Expert:   
 Expert Sub Category: Select Expert Type first...  
 DD Status: All

Country/Territory: All  
 City: Select Country/Territory first...  
 High Level Class of Business: All

Panel Name: UK Adjusters [Submit]

Expert Organisation	HQ/Branch Name	HQ or Branch	Type of Expert	Expert SubCategory	Location	Locations Covered	DD Status	DD Up to Date?
<a href="#">Add to Panel</a> Cheapside Adjusters Ltd	Cheapside Adjusters Ltd - London	Branch	-	-	-	0	Pending	✖
<a href="#">Remove from Panel</a> ABC Company	ABC Company - London	Branch	-	-	-	0	Pending	✖

To remove an Expert from your panel, click 'Remove from Panel'

## 5.0 Claims

### 5.1 My Claims

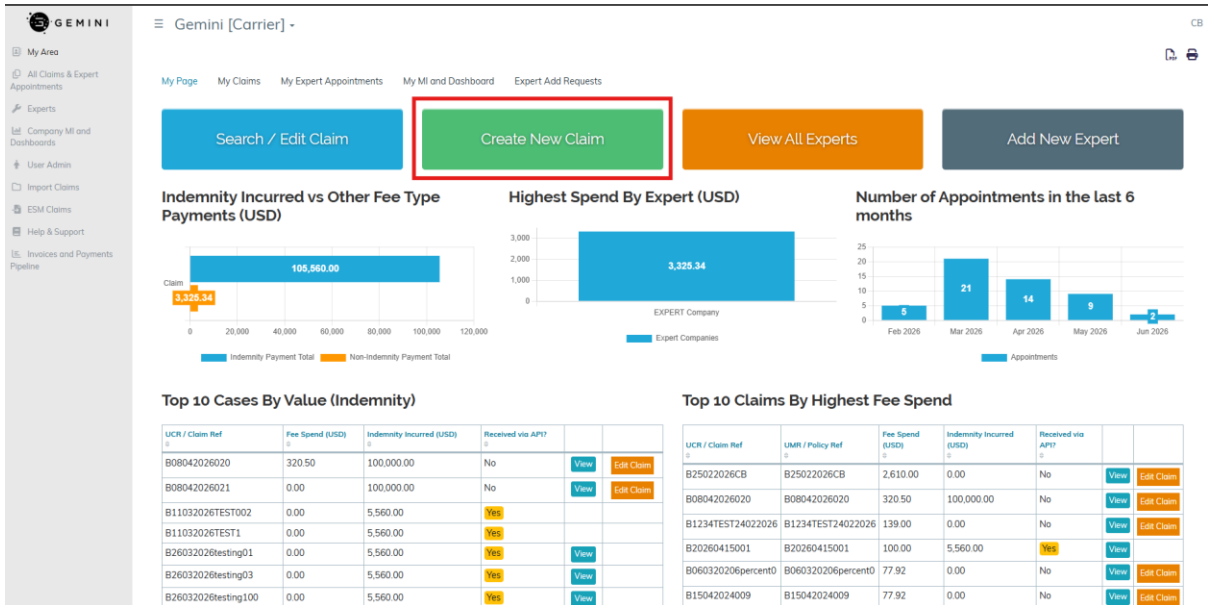
Within the 'My Claims' tab you will be able to search, view, update and edit all your manual claims. The user may also be able to search for all company claims with the tab 'All Claims & Expert Appointments' (subject to permissions).

For non writeback users you can manually add a claim onto the system and update it throughout the life of the claim (see instructions below). For those Managing Agents with a writeback provider, there is therefore no requirement to add an ECF claim to the system.

For writeback users, ECF claims will be uploaded and updated automatically via an API from your writeback provider. The user will also be able to allocate an Expert to a claim in GEMINI or via their writeback system which will be known as 'Appointments' (see instructions below). If you are registered with a writeback vendor please engage with your Write-Back vendors to plan an upgrade to your claims management solution to take advantage of GEMINI.

#### 5.1.0 How to manually create a claim – Non Writeback Users

There are 2 ways of adding a new claim – either entering the data using the GEMINI UI, or alternatively a CSV file can be created and imported to GEMINI. For the former, the user can select into 'My Area' then 'My Page'. The user can either select the 'Create New Claim' button.



or

Select the 'My Claims' button then click '+Add New Claim'.

**Filter Claims**

UCR / Claim Ref:  Date Of Loss From:

UMR / Policy Ref:  Date Of Loss To:

Insured / Reinsured:

Loss Name:

Loss Location:

High Level Class of Business:

Claim Status:

Date Modified From:

Date Modified To:

Lead Adjuster:

Handler:

**+ Add New Claim**

**Connor Carrier Inc**

Please note that claims cannot be viewed/edited if no claim carriers are selected or if your company is not part of the claim.

Bureau	UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Claim Status	Instruction count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created
Lloyd's	B03062026002	B03062026002	Test Insured	Wed, 03 Jun 2026	Tes Loss	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:47
Lloyd's	B03062026001	B03062026001	Insured Reg	Wed, 03 Jun 2026	Loss Name Reg	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:41

Fill in all mandatory (\*) fields and then select 'Save Claim'.

Please note: the Original signing Number and Date can have the following formats:

YYYYMMDDNNNNN – Lloyd’s

AAAYNNNNNDDMM - ILU

YYMMDDNNNNNNN - LIRMA

Once your claim has been saved you are able to add the relevant parties to a claim:

- Carriers – Note that you will need to add your organisations interest in the claim. If your Carrier organisation is not added, you will not be able to add any further information
  - Once your organisations interest and role are added, you should add any other Carrier participation and roles to represent all subscribers on risk
  - Please ensure that you have accurately completed Carriers, roles and participation correctly as this affects which organisations can see the claim and associated costs within GEMINI
  - Warnings have been added for specific areas e.g. More than 100% participation, leader needs to be added etc
- Expert Appointment – You can add any number of Expert appointments to a single claim
- Comments – These optional comments are specific to the claim and visible to your organisation and any other Carriers with a financial interest in the claim
- Documents – You can add supporting documents to the claim as required
- Set Risk Codes – Where the claim requires, you can add a Lloyd’s Risk Code. If you don’t not select a risk code on your claim then you will not be able to report to this level within the MI and Dashboards.

View Claim

UCR / Claim Ref: B5600MT4566
   
 UMR / Policy Ref: B5600MT4566
   
 Lead Fee Reserve: 8,000.00
   
 Erosion %: 0%

Claim details

[Edit Claim Details](#)

List of Carriers

[Add a Party](#)

UCR / Claim Ref: B5600MT4566
   
 UMR / Policy Ref: B5600MT4566
   
 Associated Indemnity UCR: -
   
 Insured / Reinsured: Insured Name
   
 Loss Name: Loss Name
   
 Loss Location: United Kingdom
   
 Date of Loss From: Thu, 14 May 2020
   
 Date of Loss To: -
   
 Claim Ref 1: -
   
 Claim Ref 2: -
   
 Received via API?: No
   
 Cat Code: -
   
 PCS Code: -
   
 Year of Account: 2020
   
 Policy Inception Date: Fri, 01 May 2020
   
 Policy Expiry Date: Sun, 31 May 2020
   
 High Level Class of Business: Accident & Health
   
 ECF Claim?: No
   
 Claim Status: Open
   
 Related UCR(s): -
   
 Lead Adjuster: Tom McArthur (tom.mcarthur@advent.claims)
   
 Handler: Tom McArthur (tom.mcarthur@advent.claims)
   
 Claim Duration: 0 minutes

Your company has not got a share in this claim, to continue with the claim please add yourself under list of carriers
   
 Signed Line % is less than 100%
   
 No lead has been set
   
 No slip lead has been set

Company (Carrier Code)	Bureau	Bureau Code	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Role
Click Edit To Select Your Carrier Code	-	-	-	-	No	No	-

Expert Appointments

[Add Expert Appointment](#)

All mandatory claim fields must be filled in to add appointment

Instruction Ref	Date created	Expert Organisation	On My Panel	Individual Expert	Received by API	Number of Pending Invoices	Total Fee Spend	Erosion %	Status	Last updated
-----------------	--------------	---------------------	-------------	-------------------	-----------------	----------------------------	-----------------	-----------	--------	--------------

This table will be populated once an Expert Appointment is created

Market Share of the Payment Summary

Carrier Company	Signed line %	Total Difference	Total Coverage	Total Subrogation	Total Adjuster Fee	Total Disbursement & Expenses	Total Other Expert	Total TPA Coverholder Fee	Total Fee Spend
-	-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Transaction Summary/Movement Details

TR Ref	Type of Movement	Movement Date	Number of Financial Details
--------	------------------	---------------	-----------------------------

This section relates to ECF Transaction Details

Associated Financial Details

Original Signing Number	Original Currency	Outstanding Amount (Original Currency)	Incurred (Original Currency)	Incurred (USD)	Settlement Currency	Settlement Amount (Settlement Currency)	Rate of Exchange	VAT
-------------------------	-------------------	--	------------------------------	----------------	---------------------	---	------------------	-----

No transactions

Financial Details

Original Currency: United Kingdom Pound (GBP)
   
 Settlement Currency: United Kingdom Pound (GBP)
   
 Lead Indemnity Reserve: 9,000.00
   
 Lead Fee Budget: 8,000.00
   
 Lead Fee Budget Currency: United Kingdom Pound (GBP)
   
 Lead Fee Reserve: 8,000.00
   
 Lead Fee Reserve Currency: United Kingdom Pound (GBP)
   
 Total Fee Spend (USD): -
   
 Erosion % (USD): 0%
   
 ⓘ Fee Payments vs Lead Fee Budget (USD)

Claim Documents

Set/Unset Lloyd's Risk Codes

File	Description	Added By Carrier
------	-------------	------------------

No documents to display

Generic Class of Business:   
 Please select...

Claim Comments

Selected Lloyd's Risk Codes

Comment	Created by
---------	------------

No Comments to display

Generic Class of Business	Risk Code
---------------------------	-----------

CoB have not been set

### 5.1.1 How to add Carriers at claim level

The system will generate the first line within 'List of Carrier' which will show an 100% share. The user will have to add their company code to this line before they are able to work on the claim. To do this select 'Edit'.

The screenshot shows the Gemini [Carrier] interface. On the left is a navigation menu with options like 'My Area', 'All Claims & Expert Appointments', 'Experts', 'Company MI and Dashboards', 'User Admin', 'Import Claims', 'ESM Claims', 'Help & Support', and 'Invoices and Payments Pipeline'. The main content area is titled 'Gemini [Carrier]' and includes a breadcrumb 'My Page > My Claims > My Expert Appointments > My MI and Dashboard > Expert Add Requests'. A message states: 'You're viewing Lloyd's. Please use the tab(s) below to select a bureau to view. Please note that you will only see tabs for bureaux your company has participation in.' Below this is a tab labeled 'Lloyd's'. A summary table shows: UCR / Claim Ref: B1101001, UMR / Policy Ref: B1101001, Total Fee Reserve (USD): 0.00, Lead Carrier: Connor Carrier Inc, Total Bureau Share: 0. The 'Claim Details' section includes: Bureau: Lloyd's, Loss Name: Test Loss Name, Insured / Reinsured: Test Insured, Date of Loss From: Fri, 05 Jun 2026, Date of Loss To: -, Loss Location: United Kingdom, Year of Account: -, Claim Ref: 1. The 'List of Carriers' section has a message: 'Signed Line % has not been set' and 'No slip lead has been set'. A table below shows one carrier: Connor Carrier Inc(Lloyd's:1101) with 'Signed line %' set to 'not set' and an 'Edit' button highlighted in red. There are also buttons for 'Click here to view the full market lines' and 'Add a Party'. The 'Expert Appointments' section has an 'Add Expert Appointment' button and a table with columns: GEMINI Instruction Ref, Carriers Appointment ID, Date created, Expert Organisation, On My Panel, Individual Expert, Received by API, Number of Pending Invoices, Fee Reserve, Total Fee Spend (USD), Erosion %, Billing Vendor Used?, Status, Last updated.

The system will bring forward a page where you will need to change your signed line as required. Once you have filled in all mandatory fields select 'Save'.

This screenshot shows the same Gemini [Carrier] interface as above, but with an 'Adjust Carriers On Claim' modal window open. The modal contains the following fields: Carrier Code (Connor Carrier Inc(Lloyd's:1101)), Signed line % (input field), Order line % (input field), Role (dropdown menu showing 'Lead'), Underwriters Reference Number (input field), and Slip Lead? (checkbox). A green 'Save' button is highlighted with a red box. The background interface is dimmed, showing the 'List of Carriers' table with the 'Edit' button still visible.

You can then add more companies by selecting 'Add a Party'. This will enable you to add all participating Carriers to the claim.

**Claim Details** [Edit Claim Details](#)

Bureau	Loss Name
Lloyd's	Test Loss Name
Insured / Reinsured	Date of Loss From
Test Insured	Fri, 05 Jun 2026
Date of Loss To	Loss Location
-	United Kingdom

**List of Carriers** [Click here to view the full market lines](#) [Add a Party](#)

No slip lead has been set To update the bureau and bureau lead, click [Edit Claim Details](#)

Company (Carrier Code)	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Role	
Connor Carrier Inc(Lloyd's:1101)	10.00000000%	-	No	Yes	Lead	<a href="#">Edit</a>

**Expert Appointments** [Add Expert Appointment](#)

GEMINI Instruction Ref	Carriers Appointment ID	Date created	Expert Organisation	On My Panel	Individual Expert	Received by API	Number of Pending Invoices	Fee Reserve	Total Fee Spend (USD)	Erosion %	Billing Vendor Used?	Status	Last updated

Please note : If you need to change the Lead Carrier Code, you will need to click Edit Claim Details on this page.

### 5.1.2 How to add a risk code for your claim

At the bottom of your claim you will find the section 'Set/Unset Lloyd's Risk Codes'.

**Set/Unset Lloyd's Risk Codes**

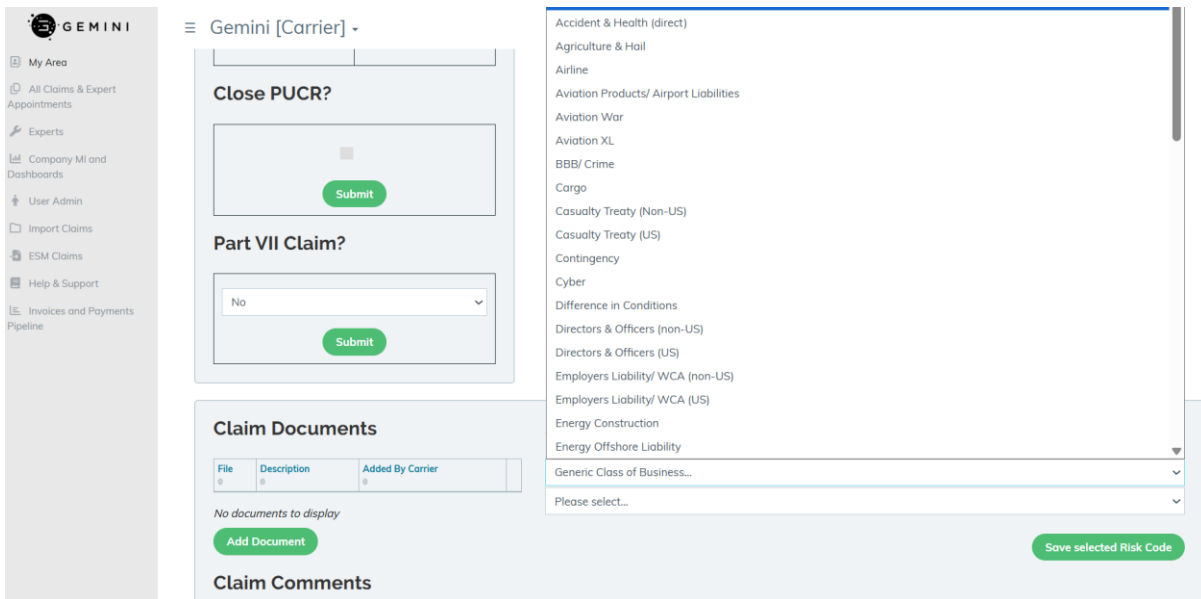
Generic Class of Business...  
Please select...

[Save selected Risk Code](#)

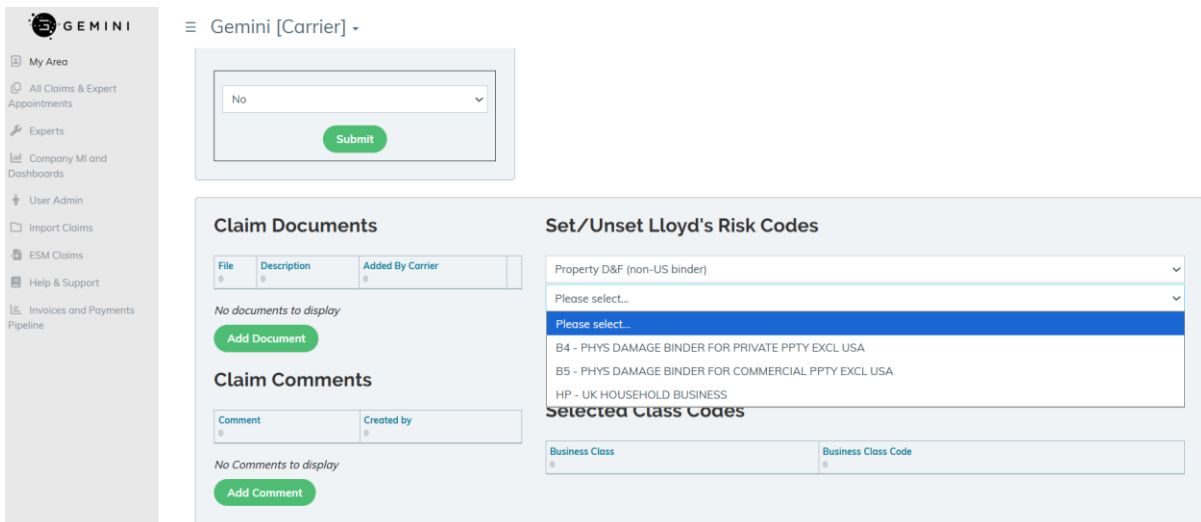
**Selected Class Codes**

Business Class	Business Class Code

If you select the drop down, you will see all Lloyd's generic classes of business.



When you select a generic class of business you will then be able to select the risk code from the list below.



Once you have selected the risk code click 'Save selected Risk Code'.

*Please note: You can only have one risk code per claim and will have to remove this before selecting a new one.*

### 5.1.3 Multi-bureaux Claims

If a Claim is split across multiple bureaux, GEMINI will store each bureau claim as a separate record with all information populated individually by the lead participant for the given bureau. GEMINI will link these separate bureau claims based on UCR, which gives experts the option to submit their invoice once for multiple bureaux when they have been instructed to do so. For claims where you participate on behalf of multiple bureaux, this provides the following benefits:

1. Reporting in the Company MI & Dashboard (for example, expert spend) will be shown based on all participating bureaux (dependent on your role within the slip).
2. On the “View Claim” screen, you will be able to switch between the bureau claims using the tabs highlighted in the screenshot below

The screenshot shows the Gemini UI for a carrier. The left-hand navigation bar includes options like 'My Area', 'All Claims & Expert Appointments', 'Experts', 'Company MI and Dashboards', 'User Admin', 'Import Claims', 'ESM Claims', 'Help & Support', and 'Invoices and Payments Pipeline'. The main content area is titled 'Gemini [Carrier] -' and shows a claim for 'Lloyd's' with a loss name of 'Test Insured'. Below this, there are two tabs: 'Lloyd's' and 'LIRMA', with 'Lloyd's' being the active tab. A table below the tabs shows details for the claim, including UCR / Claim Ref, UMR / Policy Ref, Total Fee Reserve (USD), Lead Carrier, and Total Bureau Share. To the right, there is a 'List of Carriers' section with a table showing carrier details and an 'Expert Appointments' section with a table showing appointment details.

## 5.2 How to upload Claims via a CSV import

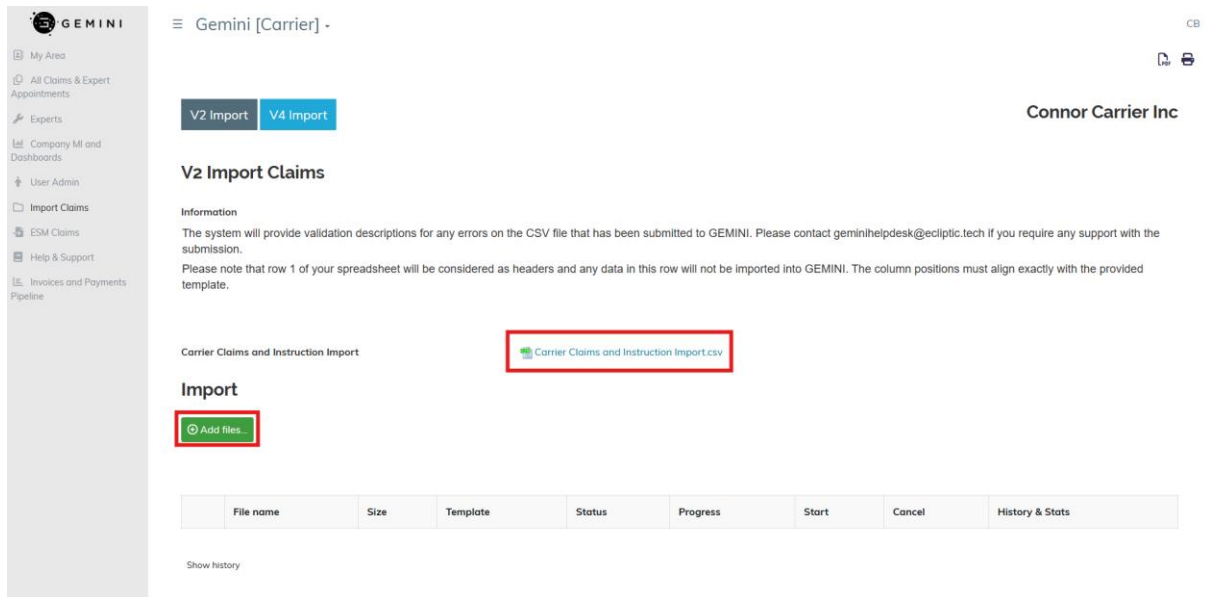
The second option to create claims on GEMINI is through a CSV upload. A Carrier user can log in to Gemini, navigate to “Import Claims” and upload a CSV file with multiple Claims as individual rows, and GEMINI will be populated with the Claims provided.

### 5.2.1 Import Claims Page

“Import Claims” is accessible by logging in to the Gemini UI and picking “Import Claims” from the Left hand navigation bar, as per the screenshot below.

The screenshot shows the Gemini UI for a carrier, specifically the 'Import Claims' page. The left-hand navigation bar is visible, with 'Import Claims' highlighted by a red arrow. The main content area is titled 'Gemini [Carrier] -' and shows a navigation bar with options like 'My Page', 'My Claims', 'My Expert Appointments', 'My MI and Dashboard', and 'Expert Add Requests'. Below this, there are two large buttons: 'Search / Edit Claim' and 'Create New Claim'. The page also displays two charts: 'Indemnity Incurred vs Other Fee Type Payments (USD)' and 'Highest Spend By'. The charts currently show 'No data to display.'

The user can then see the “Import Claims” screen, as below:



The user can then select into “V2 Import” which uses the legacy import format, or the “V4 Import” tab, which includes the new claim/appointment fields in line with the V4 Experts API.

From this page, the user can download a template CSV that can be opened and edited within Excel to include as many claims as the user wishes to Import into GEMINI, with one row per Claim. See section [Data fields](#) for more information on individual field validation.

Once the CSV file is ready for import, the user can click the green “Add Files” button, navigate to their chosen CSV claims file using the file explorer window and click “Open”. Once added, the file should be visible in the “Import” Table, as below.

### Import

[Add files...](#)

File name	Size	File type	Status	Progress	Start	Cancel	History & Stats
Carrier Claims and Instruction Import (2).csv	2988	Carrier - Claims, Appointment & Signed Percentage Import	Ready to Upload	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>	<a href="#">Start</a>	<a href="#">Cancel</a>	

After this, hit “Start” to begin uploading the file to GEMINI. Once uploaded, GEMINI will look like the below:

## Import

+ Add files...

File name	Size	File type	Status	Progress	Start	Cancel	History & Stats
<a href="#">Carrier Claims and Instruction Import (2).csv</a>	3238	Carrier - Claims, Appointment & Signed Percentage Import	File ok 1 total lines		<a href="#">Confirm</a>	<a href="#">Cancel</a>	<a href="#">Preview</a> ⓘ

Show history

Select “Confirm” to begin processing the csv file. Once complete, any errors will be shown to the user by clicking the hyperlink on status field to the errors. Please note the “Preprocessed” data tab within the errors popup will not show all data uploaded by the User, but all data uploaded can be seen in the “raw lines” tab.

### 5.2.2 Data Fields

#### 5.2.3 Claim and Instruction fields

*Please note: all fields will follow the ECF field descriptions.*

#### GEMINI Field Descriptions

The following fields correspond to individual columns on the CSV file.

**Percentage fields** – All percentage fields will be seven decimal places.

**Financial fields** – All financial fields will be two decimal places.

**Relationship Selector** – Links a record with another within the system.

**Original Signing Number and date** – this field must be saved as ‘Text’

<b>Gemini Field</b>	<b>Format</b>	<b>Mandatory/ Optional</b>	<b>Comments</b>	<b>Validation Required?</b>
UCR / Claim Ref	Text	M	BNNNN (broker code) and then up to 12 Alpha Numeric characters	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Must meet BNNNN then up to 12 alpha numeric characters</li> </ol>
UMR / Policy Ref	Text	M	BNNNN (broker code) and then up to 12 Alpha Numeric characters	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Must meet BNNNN then up to 12 alpha numeric characters</li> </ol>
Insured / Reinsured	Text	M		Mandatory validation
Loss Name	Text	M		Mandatory validation
Date of Loss From	DD/MM/YYYY	O		<ol style="list-style-type: none"> <li>1. Cannot be a future date (if present)</li> <li>2. Should accept only valid date format (if present)</li> </ol>
Date of Loss To	DD/MM/YYYY	O		<ol style="list-style-type: none"> <li>1. Cannot be a future date (if present)</li> <li>2. Cannot be earlier than "Date of Loss From" (if present)</li> <li>3. Should accept only valid date format (if present)</li> </ol>
Loss Location	Relationship Selector	M	Country must match listed country within GEMINI. Please find list in section 3.5	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Should accept only valid values within GEMINI</li> </ol>
Claim Ref 1	Text	O		
Claim Ref 2	Text	O		
Cat Code	Text	O		
PCS Code	Text	O		
Year of Account	Relationship Selector	O	YYYY	Should accept only valid values within GEMINI
Policy Inception Date	DD/MM/YYYY	O		Should accept only valid date format if present

<b>Gemini Field</b>	<b>Format</b>	<b>Mandatory/ Optional</b>	<b>Comments</b>	<b>Validation Required?</b>
Policy Expiry Date	DD/MM/YYYY	O		<ol style="list-style-type: none"> <li>Cannot be earlier than "Policy Inception Date" (if present)</li> <li>Should accept only valid date format (if present)</li> </ol>
High Level Class of Business	Relationship Selector	M	Must follow class of business selection within section 3.2	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>Should accept only valid values</li> </ol>
Claim Status	Relationship Selector	M	Open or Closed	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>Should accept only valid values</li> </ol>
Original Signing Number and Date	Please view comments section	M	S – YYYYMMDDNNNNN I – AAAYNNNNNDDMM L – YMMDDNNNNNNN Please note: this field must be saved as the format of 'Text'	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>OSND Format Validation</li> </ol>
Original Currency	Relationship Selector	M	ISO Currency code	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>Should accept only valid values</li> </ol>
Settlement Currency	Relationship Selector	O	ISO currency code	Should accept only valid values if present
Indemnity Incurred	Number	O		If present <ol style="list-style-type: none"> <li>Decimal validation</li> <li>Negative validation</li> <li>Numeric validation</li> </ol>
Lead Adjuster email	Relationship Selector	M	Must match name of user in GEMINI	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>Should accept only valid values within GEMINI</li> <li>Should show as the user's email address</li> </ol>
Handler email	Relationship Selector	M	Must match name of user in GEMINI	<ol style="list-style-type: none"> <li>Mandatory validation</li> <li>Should accept only valid values within GEMINI</li> <li>Should show as the user's email address</li> </ol>

<b>Gemini Field</b>	<b>Format</b>	<b>Mandatory/ Optional</b>	<b>Comments</b>	<b>Validation Required?</b>
Expert Organisation	Relationship Selector	M	This must match an expert company within section 4	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Should accept only valid values within GEMINI</li> </ol>
Individual Expert email	Relationship Selector	O	This must match an expert individual within section 4	Should accept only valid values if present. Value should be experts email address
Fee Budget	Number	O	Needed for ECLIPTIC to process PUCR. If this is not provided, then ECLIPTIC will create the PUCR on an invoice submission.	If present: <ol style="list-style-type: none"> <li>1. Decimal validation</li> <li>2. Negative validation</li> <li>3. Numeric validation</li> </ol>
Fee Budget Currency	Relationship Selector	O (CM)	Must be included if Lead fee budget is provided	<ol style="list-style-type: none"> <li>1. Should accept only valid values if present</li> <li>2. Must be present if Fee Budget is included</li> </ol>
Fee Reserve	Number	O	Needed for ECLIPTIC to process PUCR. If this is not provided, then ECLIPTIC will create the PUCR on an invoice submission.	If present <ol style="list-style-type: none"> <li>1. Negative validation</li> <li>2. Numeric validation</li> </ol>
Fee Reserve Currency	Relationship Selector	O (CM)	Must be included if Lead fee budget is provided	<ol style="list-style-type: none"> <li>1. Should accept only valid values if present</li> <li>2. Must be present if Fee Budget is included</li> </ol>
Billing Vendor Used?	Relationship Selector	O	Yes or No	Should accept only valid values within GEMINI
Expert claim reference	Text	O		
Fee Earner	Text	O		
Exact loss location	Text	O		
Expert Type	Relationship Selector	O	Must follow type selection within section 3.3	Should accept only valid values if present

<b>Gemini Field</b>	<b>Format</b>	<b>Mandatory/ Optional</b>	<b>Comments</b>	<b>Validation Required?</b>
Expert Sub Category	Relationship Selector	O	Must follow Sub Category selection within Section 3.3	Should accept only valid values if present
Expert Role	Relationship Selector	O	Must follow Role selection within section 3.4	Should accept only valid values if present
Appointed By	Relationship Selector	O	Must follow data selection within section 3.4	Should accept only valid values if present
Instruction Description	Text	O		
Status	Relationship Selector	M	Open, Closed or Cancelled	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Should accept only valid values</li> </ol>
Claim Carrier	Text	M	If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. If 1st advice of a UCR must be valid company code</li> <li>3. If subsequent advice, must be equivalent to details supplied on 1st advice</li> </ol>
Line ID	Text	M	If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. If 1st advice of a UCR must be valid company code</li> <li>3. If subsequent advice, must be equivalent to details supplied on 1st advice</li> <li>4. Line ID value cannot be duplicated for another carrier on the same claim</li> </ol>
Carrier Code	Text	M	L – ANNNN S – NNNN I – NNNN NN If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. If 1st advice of a UCR must be valid company code</li> <li>3. If subsequent advice, must be equivalent to details supplied on 1st advice</li> </ol>

Gemini Field	Format	Mandatory/ Optional	Comments	Validation Required?
Signed line %	Percentage	M	If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Should accept only valid values</li> <li>3. If 1st advice of a UCR must be valid company code</li> <li>4. If subsequent advice, must be equivalent to details supplied on 1st advice</li> </ol>
Bureau Lead?	Relationship Selector	O	Yes or No If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Should accept only valid values if present</li> <li>2. If 1st advice of a UCR must be valid company code</li> <li>3. If subsequent advice, must be equivalent to details supplied on 1st advice</li> </ol>
Slip Lead?	Relationship Selector	O	Yes or No If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Should accept only valid values if present</li> <li>2. If 1st advice of a UCR must be valid company code</li> <li>3. If subsequent advice, must be equivalent to details supplied on 1st advice</li> </ol>
Role	Relationship Selector	M	Lead Agreement Party Follower If more than one carrier please repeat on separate columns against the same row	<ol style="list-style-type: none"> <li>1. Mandatory validation</li> <li>2. Should accept only valid values</li> <li>3. Lead Role must be the same for subsequent advice</li> <li>4. Agreement Party and Follower can change</li> </ol>

GEMINI Valid Sub Types – Classes of Business

<b>High Level Class of Business</b>
Specialty Other
Property Treaty
Aviation
Marine
Property (D&F)
Casualty FinPro
Energy
Casualty Other
Accident & Health
Casualty Treaty

GEMINI Valid Sub Types – Expert Type & Sub Category

<b>Expert Type</b>	<b>Expert Sub Category</b>
Adjusting	1 <sup>st</sup> Party
Adjusting	3 <sup>rd</sup> Party
Engineer	Engineer
Forensic Accountant	Forensic Accountant
Legal	Coverage
Legal	Defence
Legal	Mediation
Legal	Monitoring Counsel
Legal	Subrogation
Medical	Doctor
Medical	Agency
Medical	Rehabilitation
Other	Construction
Other	Fire (Cause & Origin)
Other	IT Specialist
Other	Legal Cost Negotiation
Other	Private Investigator
Other	Valuer
Other	Vet
Subrogation Agent	Subrogation Agent
Surveyor	Surveyor
TPA/CH	TPA/CH

GEMINI Valid Sub Types – Expert Role & Appointed By

Field	Selection
Expert Role	Supervisory
Expert Role	Direct
Appointed By	Slip
Appointed By	Carrier

#### Valid Countries Listing

Country/Territory	Alpha-2 Code	Alpha-3 Code
Afghanistan	AF	AFG
Albania	AL	ALB
Algeria	DZ	DZA
American Samoa	AS	ASM
Andorra	AD	AND
Angola	AO	AGO
Anguilla	AI	AIA
Antarctica	AQ	ATA
Antigua and Barbuda	AG	ATG
Argentina	AR	ARG
Armenia	AM	ARM
Aruba	AW	ABW
Australia	AU	AUS
Austria	AT	AUT
Azerbaijan	AZ	AZE
Bahamas (the)	BS	BHS
Bahrain	BH	BHR
Bangladesh	BD	BGD
Barbados	BB	BRB
Belarus	BY	BLR
Belgium	BE	BEL
Belize	BZ	BLZ
Benin	BJ	BEN
Bermuda	BM	BMU
Bhutan	BT	BTN
Bolivia (Plurinational State of)	BO	BOL
Bosnia and Herzegovina	BA	BIH
Botswana	BW	BWA
Bouvet Island	BV	BVT
Brazil	BR	BRA
British Indian Ocean Territory (the)	IO	IOT
Brunei Darussalam	BN	BRN
Bulgaria	BG	BGR

Burkina Faso	BF	BFA
Burundi	BI	BDI
Cambodia	KH	KHM
Cameroon	CM	CMR
Canada	CA	CAN
Cabo Verde	CV	CPV
Cayman Islands (the)	KY	CYM
Central African Republic (the)	CF	CAF
Chad	TD	TCD
Chile	CL	CHL
China	CN	CHN
Christmas Island	CX	CXR
Cocos (Keeling) Islands (the)	CC	CCK
Colombia	CO	COL
Comoros (the)	KM	COM
Congo (the)	CG	COG
Congo, (the Democratic Republic of the)	CD	COD
Cook Islands (the)	CK	COK
Costa Rica	CR	CRI
Cote d'Ivoire	CI	CIV
Croatia	HR	HRV
Cuba	CU	CUB
Cyprus	CY	CYP
Czech Republic	CZ	CZE
Denmark	DK	DNK
Djibouti	DJ	DJI
Dominica	DM	DMA
Dominican Republic (the)	DO	DOM
Ecuador	EC	ECU
Egypt	EG	EGY
El Salvador	SV	SLV
Equatorial Guinea	GQ	GNQ
Eritrea	ER	ERI
Estonia	EE	EST
Ethiopia	ET	ETH
Falkland Islands	FK	FLK
Faroe Islands (the)	FO	FRO
Fiji	FJ	FJI
Finland	FI	FIN
France	FR	FRA
French Guiana	GF	GUF
French Polynesia	PF	PYF
French Southern Territories (the)	TF	ATF
Gabon	GA	GAB
Gambia (the)	GM	GMB

Georgia	GE	GEO
Germany	DE	DEU
Ghana	GH	GHA
Gibraltar	GI	GIB
Greece	GR	GRC
Greenland	GL	GRL
Grenada	GD	GRD
Guadeloupe	GP	GLP
Guam	GU	GUM
Guatemala	GT	GTM
Guernsey	GG	GGY
Guinea	GN	GIN
Guinea-Bissau	GW	GNB
Guyana	GY	GUY
Haiti	HT	HTI
Heard Island and McDonald Islands	HM	HMD
Holy See (the)	VA	VAT
Honduras	HN	HND
Hong Kong	HK	HKG
Hungary	HU	HUN
Iceland	IS	ISL
India	IN	IND
Indonesia	ID	IDN
Iran (Islamic Republic of)	IR	IRN
Iraq	IQ	IRQ
Ireland	IE	IRL
Isle of Man	IM	IMN
Israel	IL	ISR
Italy	IT	ITA
Jamaica	JM	JAM
Japan	JP	JPN
Jersey	JE	JEY
Jordan	JO	JOR
Kazakhstan	KZ	KAZ
Kenya	KE	KEN
Kiribati	KI	KIR
Korea (Democratic People's Republic of)	KP	PRK
Korea (the Republic of)	KR	KOR
Kuwait	KW	KWT
Kyrgyzstan	KG	KGZ
Lao People's Democratic Republic (the)	LA	LAO
Latvia	LV	LVA
Lebanon	LB	LBN
Lesotho	LS	LSO
Liberia	LR	LBR

Libya	LY	LBY
Liechtenstein	LI	LIE
Lithuania	LT	LTU
Luxembourg	LU	LUX
Macao	MO	MAC
North Macedonia	MK	MKD
Madagascar	MG	MDG
Malawi	MW	MWI
Malaysia	MY	MYS
Maldives	MV	MDV
Mali	ML	MLI
Malta	MT	MLT
Marshall Islands (the)	MH	MHL
Martinique	MQ	MTQ
Mauritania	MR	MRT
Mauritius	MU	MUS
Mayotte	YT	MYT
Mexico	MX	MEX
Micronesia (Federated States of)	FM	FSM
Moldova (the Republic of)	MD	MDA
Monaco	MC	MCO
Mongolia	MN	MNG
Montenegro	ME	MNE
Montserrat	MS	MSR
Morocco	MA	MAR
Mozambique	MZ	MOZ
Myanmar	MM	MMR
Namibia	NA	NAM
Nauru	NR	NRU
Nepal	NP	NPL
Netherlands (the)	NL	NLD
Netherlands Antilles	AN	ANT
New Caledonia	NC	NCL
New Zealand	NZ	NZL
Nicaragua	NI	NIC
Niger (the)	NE	NER
Nigeria	NG	NGA
Niue	NU	NIU
Norfolk Island	NF	NFK
Northern Mariana Islands (the)	MP	MNP
Norway	NO	NOR
Oman	OM	OMN
Pakistan	PK	PAK
Palau	PW	PLW
Palestine, State of	PS	PSE

Panama	PA	PAN
Papua New Guinea	PG	PNG
Paraguay	PY	PRY
Peru	PE	PER
Philippines (the)	PH	PHL
Pitcairn	PN	PCN
Poland	PL	POL
Portugal	PT	PRT
Puerto Rico	PR	PRI
Qatar	QA	QAT
Reunion	RE	REU
Romania	RO	ROU
Russia Federation (the)	RU	RUS
Rwanda	RW	RWA
Saint Helena, Ascension and Tristan da Cunha	SH	SHN
Saint Kitts and Nevis	KN	KNA
Saint Lucia	LC	LCA
Saint Pierre and Miquelon	PM	SPM
Saint Vincent and the Grenadines	VC	VCT
Samoa	WS	WSM
San Marino	SM	SMR
Sao Tome and Principe	ST	STP
Saudi Arabia	SA	SAU
Senegal	SN	SEN
Serbia	RS	SRB
Seychelles	SC	SYC
Sierra Leone	SL	SLE
Singapore	SG	SGP
Slovakia	SK	SVK
Slovenia	SI	SVN
Solomon Islands	SB	SLB
Somalia	SO	SOM
South Africa	ZA	ZAF
South Georgia and the South Sandwich Islands	GS	SGS
Spain	ES	ESP
Sri Lanka	LK	LKA
Sudan (the)	SD	SDN
Suriname	SR	SUR
Svalbard and Jan Mayen	SJ	SJM
Eswatini	SZ	SWZ
Sweden	SE	SWE
Switzerland	CH	CHE
Syrian Arab Republic (the)	SY	SYR
Taiwan ((Province of China)	TW	TWN
Tajikistan	TJ	TJK

Tanzania, the United Republic of	TZ	TZA
Thailand	TH	THA
Timor-Leste	TL	TLS
Togo	TG	TGO
Tokelau	TK	TKL
Tonga	TO	TON
Trinidad and Tobago	TT	TTO
Tunisia	TN	TUN
Turkey	TR	TUR
Turkmenistan	TM	TKM
Turks and Caicos Islands (the)	TC	TCA
Tuvalu	TV	TUV
Uganda	UG	UGA
Ukraine	UA	UKR
United Arab Emirates (the)	AE	ARE
United Kingdom of Great Britain and Northern Ireland (the)	GB	GBR
United States of America (the)	US	USA
United States Minor Outlying Islands (the)	UM	UMI
Uruguay	UY	URY
Uzbekistan	UZ	UZB
Vanuatu	VU	VUT
Venezuela (Bolivarian Republic of)	VE	VEN
Viet nam	VN	VNM
Virgin Islands (British)	VG	VGB
Virgin Islands (U.S.)	VI	VIR
Wallis and Futuna	WF	WLF
Western Sahara*	EH	ESH
Yemen	YE	YEM
Zambia	ZM	ZMB
Zimbabwe	ZW	ZWE
Unknown		

### Section Expert Companies

The Carrier company will be provided with a weekly list of all expert companies being held within GEMINI to be selected on a claim. This list will be provided along with the individual expert names associated with each company.

The list will provide the following columns:

Expert AutoRef	Company Name	Company ref	Forename	Surname	Email Address
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## Export format

To automate the claim and instruction process the data above must be provided in a single standard format, CSV (Comma delimited) (\*.csv).



Carrier Claims and  
Instructions Import.csv

A sample of this extract attached with the file name - Carrier Claims and Instructions Import.csv.

### 5.3 Lloyd's Europe & Part VII

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 in to ECF.

Please find steps below on how to trigger the Lloyd's Europe/Part VII Validation for the Expert when submitting and invoice.

#### 5.3.1 Lloyd's Europe Claims

The GEMINI system does not require any manual steps in order to activate the Lloyd's Europe validation for the Expert.

If the claims falls into the below two set criteria then the validation will be applied to the invoice.

1. Syndicate Number BETWEEN 5299-5399
2. Broker Code = 1966

### 5.3.2 Part VII Claims

The Carrier will need to carry out a manual task when creating a Part VII claim in GEMINI. This manual task will need to be carried out for both claims created manually and/or those created by the API.

When creating a manual claim in the system, there will be an additional field to select whether the claim is Part VII 'Yes' or 'No'.

The screenshot shows the 'Create Claim' interface in the GEMINI system. The left sidebar contains navigation options like 'My Area', 'All Claims & Expert appointments', 'Experts', 'Company MI and dashboards', 'User Admin', 'Import Claims', 'ESM Claims', 'Help & Support', and 'Invoices and Payments pipeline'. The main content area is titled 'Gemini [Carrier] - Create Claim'. It features two primary sections: 'Claim Details' and 'Claim Financials'. The 'Claim Details' section includes fields for 'Bureau Lead' (Lloyd's), 'UCR/Claim Ref' (1101TEST), 'UMR/Policy Ref' (1101TEST), 'Insured / Reinsured' (Test Insured), 'Loss Name' (Test Loss), 'Date of Loss Not Known', 'Date of Loss From' (04/06/2026), 'Date of Loss To' (dd/mm/yyyy), and 'Loss Location' (United Kingdom). The 'Claim Financials' section includes 'Original Currency' and 'Settlement Currency' (both United Kingdom Pound (GBP)), 'Indemnity Incurred', 'Lead Adjuster' (connor bottomley), and 'Handler' (connor bottomley). A dropdown menu for 'Part VII Claim?' is highlighted with a red box and set to 'Yes'. Below this is a 'Claim Documents' section with an 'Add new' button and a 'Save Claim' button.

If 'Yes' has been selected and the claim has been saved, the Expert will be required to capture VAT on the invoice.

If the claim has been received by the API, the Carrier has the ability to select 'Yes' or 'No' to whether this is a Part VII claim or not.

*Please Note: all other fields will remain as read only*

First, you will need to search for the claim that has been received via the API. Once you have found the correct claim, select into this by selecting the UCR ref on the left hand side.

UCR / Claim Ref: B  
 UMR / Policy Ref: B  
 Insured / Reinsured:   
 Loss Name:   
 Loss Location: All  
 High Level Class of Business: All  
 Generic Class of Business: All  
 Lead Adjuster: All  
 Handler: All

Date of Loss: From: dd/mm/yyyy To: dd/mm/yyyy  
 Date Modified: From: dd/mm/yyyy To: dd/mm/yyyy  
 Claim Status: Open  
 Created by API:

Filter Reset

UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Instruction	Lead Adjuster	Handler	Claim Status	Received via API?
<b>BLBAP200</b>	BLBAP200	Peter Pan	Fri, 26 Nov 2021	Loss name	United Kingdom	0%	1	Clive Gallehawk	Clive Gallehawk	Open	Yes
BLBAP100	BLBAP100	Peter Pan	Fri, 26 Nov 2021	Loss name	United Kingdom	0%	1	Clive Gallehawk	Clive Gallehawk	Open	Yes
BLB112	BLB112	Peter Pan	Thu, 25 Nov 2021	Loss name	United Kingdom	-	1	Clive Gallehawk	Clive Gallehawk	Open	No
BLB111	BLB111	Peter Pan	Thu, 25 Nov 2021	Loss name	United Kingdom	-	1	Clive Gallehawk	Clive Gallehawk	Open	No
BLB110	BLB110	Peter Pan	Thu, 25 Nov 2021	Loss name	United Kingdom	-	1	Clive Gallehawk	Clive Gallehawk	Open	No

You will then have the option to select 'Yes' or 'No' to the question, 'Part VII Claim?'

Financial Details

Total Fee Budget (USD): 1,390.00  
 Total Fee Reserve (USD): 695.00  
 Total Fee Spend (USD): -  
 Erosion % (USD): 0%  
 Fee Payments vs Fee Budget (USD)

Associated Fee Financial Details

Original Signing Number	Original Currency	Outstanding Amount (Original Currency)	Incurred (Original Currency)	Incurred (USD)	Settlement Currency	Settlement Amount (Settlement Currency)	Rate of Exchange	VAT
No transactions								

Part VII Claim?  
 No  
 Submit

Set/Unset Lloyd's Risk Codes

Generic Class of Business...  
 Please select...

If 'Yes' has been selected and you have selected the 'Submit' button, the Expert will be required to capture VAT on the invoice.

#### 5.4 How to search a claim – Writeback & Non-Writeback Users

GEMINI captures granular data on Expert appointments and spend at an individual claim level, and this section explains how to search and get access to the individual claim record. To search for a claim, select 'My Area' then 'My Claims'.

Enter the search criteria and select the Filter button as shown. The claim list will shrink to claims matching that criteria. You can then select the claim you need by click the 'UCR/Claim Ref'.

### 5.4.1 How to search all Lead and Follow Claims

Depending on your user permissions, you may have access to search all lead claims and those where your company follows. To do this select 'All Claims & Expert Appointments'.

UCR / Claim Ref: B

UMR / Policy Ref: B

Insured / Reinsured: Insured Name

Loss Name: Loss Name

Loss Location: All

High Level Class of Business: All

Generic Class of Business: All

Lead Adjuster: All

Handler: All

Date of Loss: From: dd/mm/yyyy, To: dd/mm/yyyy

Date Modified: From: dd/mm/yyyy, To: dd/mm/yyyy

Claim Status: Open

UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Instruction count	Lead Adjuster	Handler	Claim Status	Received via API?
B5600MT4566	B5600MT4566	Insured Name	Thu, 14 May 2020	Loss Name	United Kingdom	0%	0	Tom McArthur	Tom McArthur	Open	No

Enter the search criteria and select the filter button as shown. The claim list will shrink to claims matching that criteria. You can then select the claim you need.

UCR / Claim Ref: B

UMR / Policy Ref: B

Insured / Reinsured: Insured Name

Loss Name: Loss Name

Loss Location: All

High Level Class of Business: All

Generic Class of Business: All

Lead Adjuster: All

Handler: All

Date of Loss: From: dd/mm/yyyy, To: dd/mm/yyyy

Date Modified: From: dd/mm/yyyy, To: dd/mm/yyyy

Claim Status: Open

UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Instruction count	Lead Adjuster	Handler	Claim Status	Received via API?
B5600MT4566	B5600MT4566	Insured Name	Thu, 14 May 2020	Loss Name	United Kingdom	0%	0	Tom McArthur	Tom McArthur	Open	No

Please note: all users are given read only access with all follow claims.

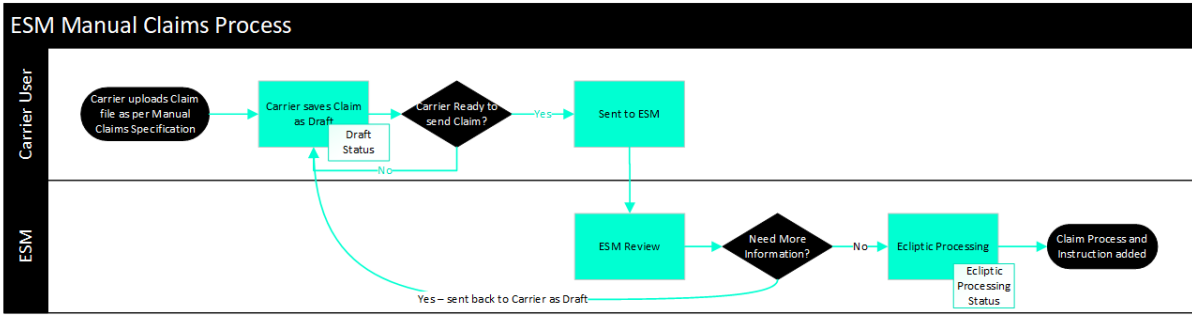
## 5.5 ECLIPTIC Service Management (ESM) processing

ECLIPTIC provide a service to the Market to upload their claims & instructions onto GEMINI on behalf of the Carrier. This will be uploaded onto GEMINI which will then be sent to ESM for processing. Once this document has been received ECLIPTIC will either manually enter in the claim information and/or upload this via our claim import.

Please note: this document must be uploaded as per the agreed template with ECLIPTIC

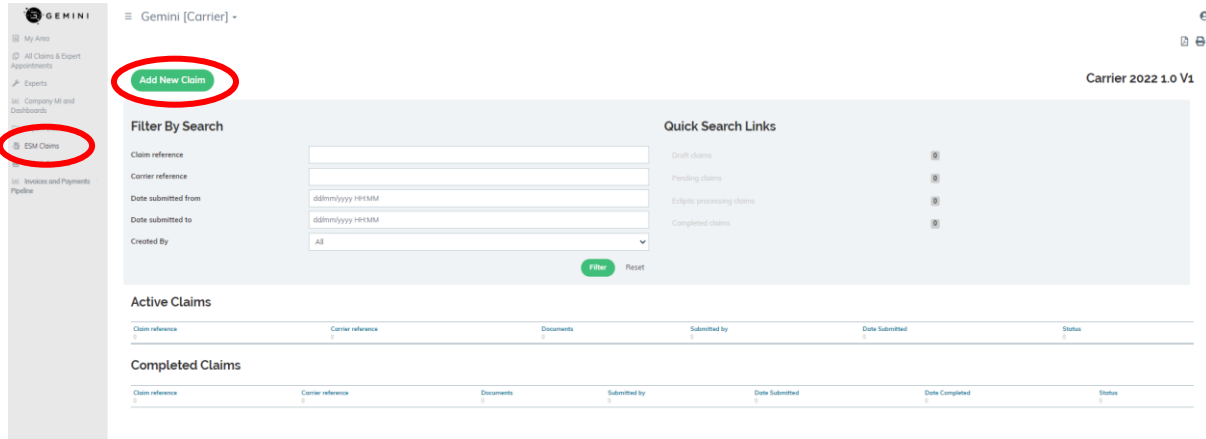
ECLIPTIC will be checking this folder daily and will process the Carrier claims within a two day SLA

The claim lifecycle will follow the below process to handle all queries and rejections.

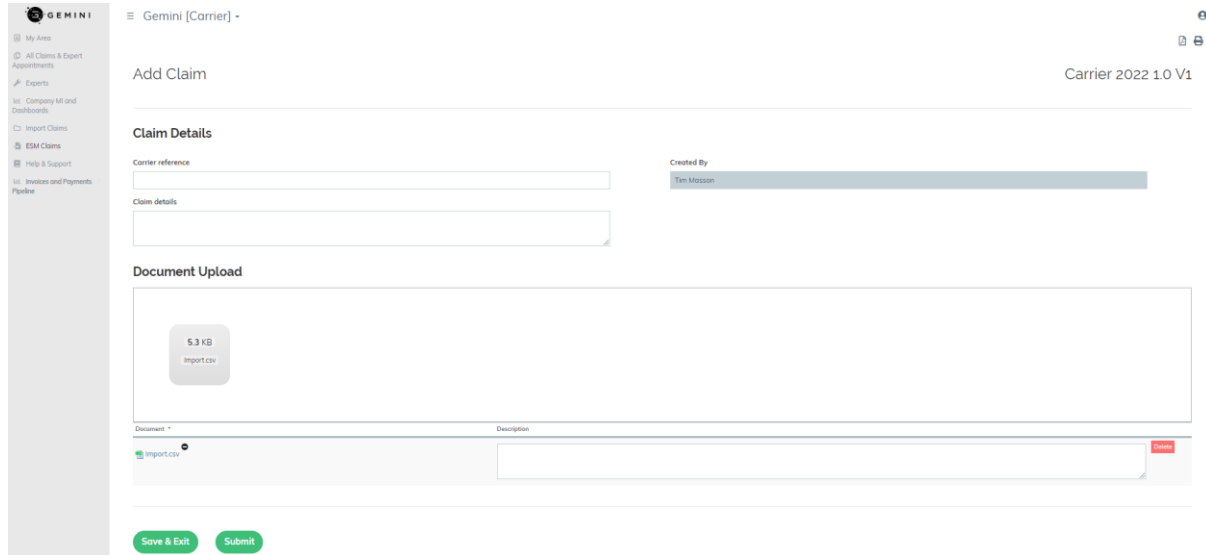


### 5.5.1 How to submit a file onto GEMINI

To upload your claims file to GEMINI please select the tab 'ESM Claims'. The user can then select 'Add New Claim' to add a new claim file to be processed by the ECLIPTIC Service Management Team.



The user will then need to enter in the claim file details. It is only mandatory to provide the claim file as per the Manual Claims Specification.



Once you have completed all fields you can either 'Save and Exit' which will save this as a draft or select 'Submit' which will submit this to the ECLIPTIC Service Management Team.

## 5.5.2 Queries and Rejections

Please note: ECLIPTIC will only process files that are received within the GEMINI standard as shown within the Manual Claims Specification.

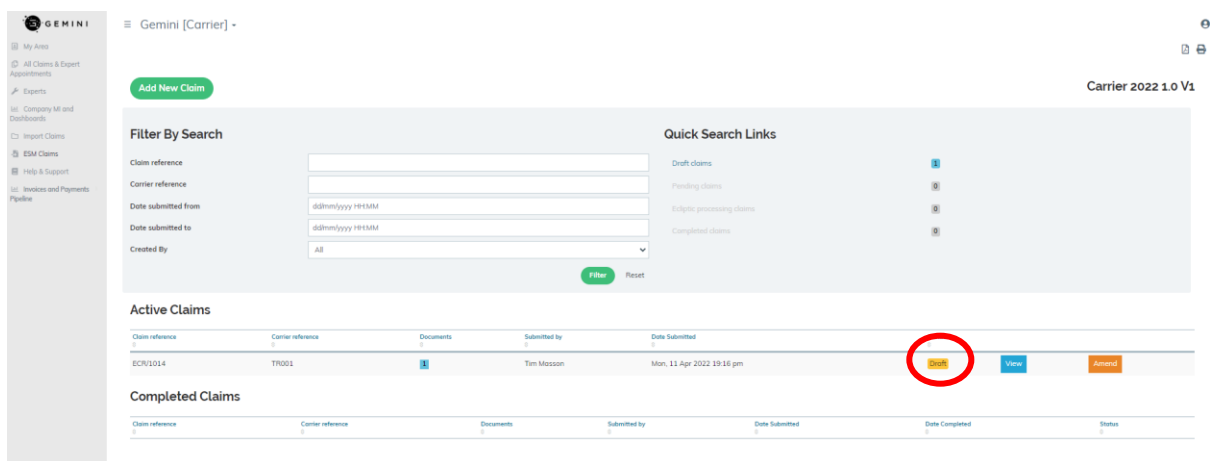
ECLIPTIC will be able to query/reject an entry once this is received from the user. This could be for many reasons which will be included within the commentary once the entry has been queried/rejected back to the user. ECLIPTIC will be providing their comments back to the user within a free text field completed by the ECLIPTIC helpdesk team.

Please find example below of how a query/rejection will be made. Within the upload the Carrier will be able to add multiple rows of claim and instructions information which the ECLIPTIC team will import within the system. If there is only an issue with one row of the entry then ECLIPTIC will query the entire entry but will refer to the exact claim(s) and instruction(s) that was rejected from the import.

Once ECLIPTIC query this entry the user will receive an email notification to advise their entry has been queried.

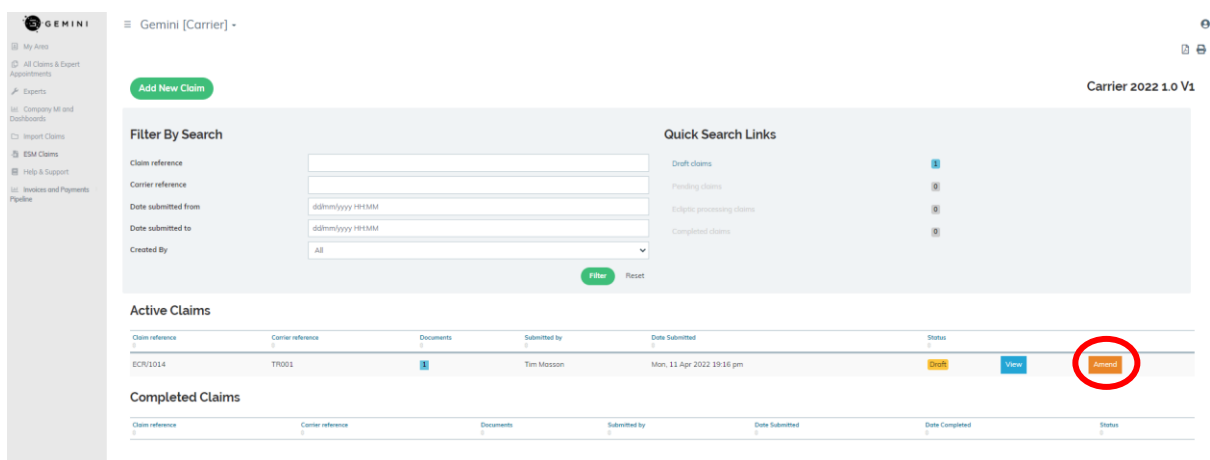
INSERT EMAIL HERE

The user can view this back in 'Draft' state within the system.



The screenshot shows the GEMINI system interface for a carrier. The top navigation bar includes 'Add New Claim' and 'Carrier 2022 1.0 V1'. The main content area is divided into 'Filter By Search' and 'Quick Search Links'. The 'Filter By Search' section contains fields for 'Claim reference', 'Carrier reference', 'Date submitted from', 'Date submitted to', and 'Created By'. The 'Quick Search Links' section includes 'Draft claims', 'Pending claims', 'Eligible processing claims', and 'Completed claims'. Below these sections are two tables: 'Active Claims' and 'Completed Claims'. The 'Active Claims' table has columns for 'Claim reference', 'Carrier reference', 'Documents', 'Submitted by', and 'Date Submitted'. A row is shown with 'ECR/1014' as the claim reference, 'TR001' as the carrier reference, 'Tim Masson' as the submitter, and 'Mon, 11 Apr 2022 19:16 pm' as the date. The status of this claim is 'Draft', which is circled in red. There are also 'View' and 'Amend' buttons for this claim.

The user can amend the entry by selecting 'Amend'



This screenshot is identical to the previous one, but the 'Amend' button for the 'Draft' claim in the 'Active Claims' table is circled in red, indicating that the user can click it to edit the entry.

The Carrier can then either provide a single row(s) back to ECLIPTIC to process or update the entry and provide the full claims spreadsheet back to the ECLIPTIC team. Once this has been completed, select 'Submit'.

The screenshot shows the 'Add Claim' interface. On the left is a navigation menu with 'My Area' selected. The main content area has a header 'Add Claim' and 'Carrier 2022 1.0 V1'. Below this is the 'Claim Details' section with input fields for 'Carrier reference' (TR001) and 'Claim details' (TEST). To the right, there are fields for 'Created By' (Tim Mission) and 'Date Submitted' (11/04/2022 19:16). The 'Document Upload' section has a large empty box with instructions to upload a file. Below that is a table with columns 'Document' and 'Description'. The 'Review comments from ESM' section shows a comment: 'Please can you update UCR XXXX for expert XXXX'. At the bottom, there are two buttons: 'Save & Exit' and 'Submit', with the 'Submit' button circled in red.

ECLIPTIC will then process the file via the import. This process will then be replicated if there are still existing issues against any claims and instructions.

## 5.6 How to edit claim details – Non-Writeback Users

To edit a claim select 'My Area' and then 'My Claims'. The user can then select into the claim they want to edit.

The screenshot shows the 'My Claims' page. The left navigation menu has 'My Area' and 'My Claims' highlighted with red boxes. The main content area has a header 'My Page My Claims My Expert Appointments My MI and Dashboard Expert Add Requests'. Below this is a green button 'Request to add an Expert Organisation' and another green button '+ Add New Claim'. The 'Filter Claims' section has several dropdown menus for 'UCR / Claim Ref', 'UMR / Policy Ref', 'Insured / Reinsured', 'Loss Name', 'Loss Location', 'High Level Class of Business', and 'Claim Status'. To the right, there are date and dropdown filters for 'Date Of Loss From', 'Date Of Loss To', 'Date Modified From', 'Date Modified To', 'Lead Adjuster', and 'Handler'. A 'Filter' button and a 'Reset' button are at the bottom right. Below the filters is a table of claims with columns: Bureau, UCR / Claim Ref, UMR / Policy Ref, Insured / Reinsured, Date of Loss From, Loss Name, Loss Location, Erosion %, Claim Status, Instruction count, Open Instructions, Lead Adjuster, Handler, Created by API, Date created, and two columns with 'View' and 'Edit' buttons. The 'View' and 'Edit' buttons for the first two rows are highlighted with red boxes.

Bureau	UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Claim Status	Instruction count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created	View	Edit
Lloyd's	B03062026002	B03062026002	Test Insured	Wed, 03 Jun 2026	Tes Loss	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:47	View	Edit
Lloyd's	B03062026001	B03062026001	Insured Reg	Wed, 03 Jun 2026	Loss Name Reg	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:41	View	Edit

Select 'Edit' and update the areas required, then click 'Save Claim'.

## 5.7 How to change the Lead Adjuster and Handler - Non Writeback Users

Select 'My Area' -> 'My Claims'. The user can then select into the claim they want to edit.

**Filter Claims**

UCR / Claim Ref: B  
 UMR / Policy Ref: B  
 Insured / Reinsured:   
 Loss Name:   
 Loss Location: All  
 High Level Class of Business: All  
 Claim Status: Open

Date Of Loss From: dd/mm/yyyy  
 Date Of Loss To: dd/mm/yyyy  
 Date Modified From: dd/mm/yyyy  
 Date Modified To: dd/mm/yyyy  
 Lead Adjuster: All  
 Handler: All

**Connor Carrier Inc**

**Filter** **Reset**

*Please note that claims cannot be viewed/edited if no claim carriers are selected or if your company is not part of the claim.*

Bureau	UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Claim Status	Instruction Count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created	View	Edit
Lloyd's	B03062026002	B03062026002	Test Insured	Wed, 03 Jun 2026	Test Loss	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:47	View	Edit
Lloyd's	B03062026001	B03062026001	Insured Reg	Wed, 03 Jun 2026	Loss Name Reg	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:41	View	Edit

On the right hand side of the screen you will be able to change the 'Lead Adjuster' and 'Handler' by selecting from the drop down tab. This will show all users on the system within your company. Click 'Save Claim' to update your changes.

**GEMINI** Gemini [Carrier] - CB

My Area  
 All Claims & Expert Appointments  
 Experts  
 Company MI and Dashboards  
 User Admin  
 Import Claims  
 ESM Claims  
 Help & Support  
 Invoices and Payments Pipeline

My Page My Claims My Expert Appointments My MI and Dashboard Expert Add Requests

### Edit Claim

#### Claim Details

Bureau Lead \*  
Lloyd's  
5305 (Lloyd's Connor Carrier Inc)

UCR/Claim Ref *	UMR/Policy Ref *
B 03062026002	B 03062026002
Insured / Reinsured *	Loss Name *
Test Insured	Tes Loss
Date of Loss Not Known	Date of Loss From *
	03/06/2026
Date of Loss To	Loss Location *
dd/mm/yyyy	United Kingdom
	Most commonly used countries will appear first.
Claim Ref 1	Claim Ref 2

#### Claim Financials

Original Currency *	Settlement Currency *
Brazilian Real (BRL)	Brazilian Real (BRL)
Indemnity Incurred	Part VII Claim?
	Please select...
Lead Adjuster *	Handler *
connor bottomley	connor bottomley

[optional]

#### Claim Documents

Description *	File *	+ Add new

**Save Claim**

## 5.8 How to close a claim - Non Writeback Users

Select 'My Area' -> 'My Claims' -> then select 'Edit' for the claim you wish to close.

**GEMINI** Gemini [Carrier] - C

My Area  
 All Claims & Expert Appointments  
 Experts  
 Company MI and Dashboards  
 User Admin  
 Import Claims  
 ESM Claims  
 Help & Support  
 Invoices and Payments Pipeline

My Page My Claims My Expert Appointments My MI and Dashboard Expert Add Requests

**Request to add an Expert Organisation** + Add New Claim

### Filter Claims

Connor Carrier Inc

UCR / Claim Ref	B	Date Of Loss From	dd/mm/yyyy
UMR / Policy Ref	B	Date Of Loss To	dd/mm/yyyy
Insured / Reinsured		Date Modified From	dd/mm/yyyy
Loss Name		Date Modified To	dd/mm/yyyy
Loss Location	All	Lead Adjuster	All
High Level Class of Business	All	Handler	All
Claim Status	Open		

**Filter** Reset

*Please note that claims cannot be viewed/edited if no claim carriers are selected or if your company is not part of the claim.*

Bureau	UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Claim Status	Instruction count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created	
Lloyd's	B03062026002	B03062026002	Test Insured	Wed, 03 Jun 2026	Tes Loss	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:47	<b>View</b> <b>Edit</b>
Lloyd's	B03062026001	B03062026001	Insured Reg	Wed, 03 Jun 2026	Loss Name Reg	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:41	<b>View</b> <b>Edit</b>

You will then be able to change the claim status to closed and save the claim.

### 5.9 How to close a PUCR – Non Writeback Users

Select 'My Area' -> 'My Claims' -> then select 'View' for the claim you wish to request a closing sequence for.

Business	UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Emission %	Claim Status	Instruction count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created
Lloyd's	B03062026002	B03062026002	Test Insured	Wed, 03 Jun 2026	Test Loss	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:47
Lloyd's	B03062026001	B03062026001	Insured Reg	Wed, 03 Jun 2026	Loss Name Reg	United Kingdom	-	Open	1	1	connor bottomley	connor bottomley	No	Wed, 03 Jun 2026 09:41

At the bottom of the page, you will be able to tick the box in the highlighted area and then click 'submit'.

The screenshot shows the Gemini [Carrier] interface. At the top, there is a table with the following data:

Total Fee Reserve (USD)	0.00	Total Fee Spend (USD)	0
Erosion % (USD)			

Below the table, there is a section titled "Close PUCR?" which is highlighted with a red box. It contains a "Submit" button. Below this is a "Part VII Claim?" section with a dropdown menu set to "No" and a "Submit" button. At the bottom, there are sections for "Claim Documents", "Set/Unset Lloyd's Risk Codes", and "Claim Comments".

This will then be added to a queue for our team to process onto ECF, which can take up to 2 working days.

## 6.0 Expert Appointments

### 6.1 My Expert Appointments

This tab shows all Expert appointments related to your claims. You will be able to search, view, update and edit all your manual appointments. For writeback users, ECF appointments will be uploaded and updated automatically via an API from your writeback provider. For non-writeback users you can manually add an appointment onto the system and update it throughout the life of the appointment (see instructions below).

### 6.2 How to create an Expert appointment – Non-Writeback User

This function allows the user to manually record an Expert appointment on a claim and track fee budgets, fee spend and costs against budget and indemnity.

Find a claim using the search and filter function within 'My Area' -> 'My Claims' -> then select the claim that requires the appointment of an Expert.

My Area

My Claims

Request to add an Expert Organisation

Managing Agent Company

Filter Claims

UCR / Claim Ref: B

UMR / Policy Ref: B

Insured / Reinsured:

Loss Name:

Loss Location: All

High Level Class of Business: All

Claim Status: Open

UCR / Claim Ref	UMR / Policy Ref	Insured / Reinsured	Date of Loss From	Loss Name	Loss Location	Erosion %	Claim Status	Instruction count	Open Instructions	Lead Adjuster	Handler	Created by API	Date created	
B5600MT4566	B5600MT4566	Insured Name	Thu, 14 May 2020	Loss Name	United Kingdom	0%	Open	0	0	Tom McArthur	Tom McArthur	No	Wed, 03 Jun 2020 08:55 am	Edit Claim

Download CSV

Once you are in the claim which you wish to add the appointment select 'Add Expert Appointment'.

View Claim

UCR / Claim Ref: B5600MT4566

UMR / Policy Ref: B5600MT4566

Lead Fee Reserve: 8,000.00

Erosion %: 0%

Claim details

UCR / Claim Ref: B5600MT4566

UMR / Policy Ref: B5600MT4566

Associated Indemnity UCR: -

Insured / Reinsured: Insured Name

Loss Name: Loss Name

Loss Location: United Kingdom

Date of Loss From: Thu, 14 May 2020

Date of Loss To: -

Claim Ref 1: -

Claim Ref 2: -

List of Carriers

Company (Carrier Code)	Bureau	Bureau Code	Signed line %	Order line %	Slip Lead?	Bureau Lead?	Role
Managing Agent Company(Lloyd's:1234)	Lloyd's	S	100.000000%	-	Yes	Yes	Lead

Expert Appointments

Instruction Ref	Date created	Expert Organisation	On My Panel	Individual Expert	Received by API	Number of Pending Invoices	Total Fee Spend	Erosion %	Status	Last updated

This table will be populated once an Expert Appointment is created

This will allow you to create and assign your instruction.

If you know the Expert organisation you would like to appoint and you know they are registered in the system you can enter the Expert organisation and individual Expert in the text box below.

**Add Expert Appointment to ( Policy B7643edjkhgwd - Claim B7643edjkhgwej )**

UCR / Claim Ref	B7643edjkhgwd	High Level Class of Business	Casualty FinPro
Insured / Reinsured	Mr Smith	Original Currency	GBP
Loss Name	Fire	Indemnity Incurred	4,000.00
Claim Status	Open	Total Fee Budget (USD)	27,800.00
Loss Location	Guernsey	Total Fee Reserve (USD)	139,000.00
Date of Loss From	Wed, 19 Jul 2023		
Date of Loss To	Wed, 19 Jul 2023		

**Assign Expert/ Organisation**

Choose whether to assign this instruction to an Expert Company or Individual Expert

Expert Organisation \*

Individual Expert

Search For All Experts ~

If you wish to use a non-registered expert, tick the box then enter their name

Use Non-Registered Expert?

Billing Vendor Used?

Expert Claim Reference

Fee Earner

Exact Loss Location

Expert Type

Expert Sub Category

Expert Role

Appointed By

Fee Reserve

Fee Reserve Currency

Fee Budget

Fee Budget Currency

Instruction Description

Status

If you do not know the Expert you wish to appoint then you are able to search the database by selecting 'Search Expert'. This will drop down a search function.

Claim Status  Total Fee Budget (USD) 27,800.00

Loss Location Guernsey Total Fee Reserve (USD) 139,000.00

Date of Loss From Wed, 19 Jul 2023

Date of Loss To Wed, 19 Jul 2023

**Assign Expert/ Organisation**

Choose whether to assign this instruction to an Expert Company or Individual Expert

Expert Organisation \*

Individual Expert

If you wish to use a non-registered expert, tick the box then enter their name

Use Non-Registered Expert?

Billing Vendor Used?

Expert Claim Reference

Fee Earner

Exact Loss Location

Expert Type

Expert Sub Category

Expert Role

Appointed By

Fee Reserve

Fee Reserve Currency

Fee Budget

Fee Budget Currency

Instruction Description

Status

Company

Company Branches

Expert User

Organisation's Services provided

Type of Expert

Expert Sub Category

Country/Territory

City

On my Panel  No  Yes

You can then search based on a range of criteria including Expert name, territory (Country/City), Expert type and whether they are on your panel or not. Select the 'Search' button to provide a list of Experts matching the criteria.

*Please note: This search function will provide a list of Experts meeting the criteria but you cannot select directly from this list and you will still need to add the Expert organisation in the 'Assign Expert/Organisation' in order to allocate them to the claim.*

If you cannot find a suitable registered Expert, you can appoint a non-registered Expert. To add a non-registered Expert, select the tick box 'Use Non-Registered?'.

**Assign Expert/ Organisation**

If you wish to use a non-registered expert, tick the box then enter their name

Use Non-Registered Expert?

Non-Registered Expert Organisation Name \*

Non-Registered Expert Name \*

Non-Registered Expert Email Address \*

Billing Vendor Used?

Expert Claim Reference

Fee Earner

Exact Loss Location

Expert Type

Expert Sub Category

Expert Role

Appointed By

Fee Reserve

Fee Reserve Currency

Fee Budget

Fee Budget Currency

Instruction Description

Status

Save

Once you select this tick box the system will allow you to enter in the name of the non-registered Expert company, the individual Expert name and their contact email. Once this instruction has been saved, ECLIPTIC will receive a notification request to register your instructed Expert onto GEMINI.

*Please note: If this Expert rejects the request to register within GEMINI then this instruction will be saved as a 'Non-registered Expert Appointment'.*

Once you have selected either a registered or non-registered Expert you have the option to add: 'Fee Reserve/budget', 'Expert Type' & 'Sub Category', 'Expert Role', 'Appointed By', 'Currency', 'Instruction Description', 'Status'. You can also specify whether a third-party Billing Vendor is used. Ticking this box means Experts cannot use GEMINI to submit invoices against this Appointment, and will instead need to go through your Billing Vendor.

You can then save this appointment by selecting 'Save'.

Once saved, the appointment will be visible to the Expert (registered Experts only) and additional information by way of notes, documents and tasks can be added if/where required.

*Please note – Expert Appointments cannot be deleted or the Expert changed. If the Expert company does change on a claim, the appointment must be cancelled and a new appointment added for the new Expert. If a payment has been made to that Expert, the appointment must be closed (rather than cancelled) and a new appointment added.*

### 6.2.1 Fee Reserve & Fee Budget

The Fee budget is the initial Fee Reserve set for the instruction. This could be updated from further reports sent by the Expert. Unlike the reserve which will change upon invoices being submitted, the budget will remain set as entered by the claims adjuster. This will mean the Carrier is able to see how much they spent on Expert fees against the initial Fee budget set (fee reserve).

**Non-Writeback Users** - When the instruction is created within GEMINI, this will include the Fee Reserve and the Fee Budget. Once in GEMINI, this prompts the creation of the Parallel UCR to include the Fee Reserve and this reserve is stored within ECF. If there has been an update on the fee reserve being held on the Parallel UCR then this will automatically update within the GEMINI system for the instruction.

**Writeback Users** – When the instruction is sent from your claims management system, the instruction will include the Fee Reserve and the Fee Budget. Once in GEMINI, this prompts the creation of the Parallel UCR to include the Fee Reserve and this reserve is sent back to the WB system from ECF. If there has been an update on the fee reserve being held on the

Parallel UCR then this will automatically update within your Writeback system for the instruction. Your Writeback system will then send the instruction details again to GEMINI, including the updated Fee Reserve held on the instruction

### 6.3 How to search for an appointment – Writeback & Non-Writeback Users

Select into 'My Area' -> 'My Expert Appointments' -> then by using the different filter options you are able search for a specific appointment and select the one you need to review and/or update. The appointment listing also includes summary information to assist with the location of the required case.

You also have the option to search by active or cancelled appointments.

The screenshot shows the Gemini [Carrier] interface. The left sidebar has 'My Area' circled in red. The main navigation bar has 'My Expert Appointments' circled in red. Below it, 'Active Expert Appointments' and 'Cancelled Expert Appointments' are also circled in red. The main content area is titled 'My Expert Appointments' and includes a 'Filter Appointments' section with various dropdown menus and input fields. A table below the filters shows a list of appointments with columns for Ref, UCR / Claim Ref, UMR / Policy Ref, Expert Organisation, Individual Expert, Currency, Fee Reserve/budget, Total Fee Spend (USD), Erosion %, Status, Date created, and Received via API?.

Ref	UCR / Claim Ref	UMR / Policy Ref	Expert Organisation	Individual Expert	Currency	Fee Reserve/budget	Total Fee Spend (USD)	Erosion %	Status	Date created	Received via API?
Instr-262	B5600MT4566	B5600MT4566	ABC Company	Tom McArthur (Registered)	GBP	8,000.00	-	0%	Open	Wed, 03 Jun 2020 09:22 am	No

If you have been set the correct permissions, you can also search for all company instructions by selecting 'All Claims & Expert Appointments' -> 'Active Expert Appointments'

The screenshot shows the Gemini [Carrier] interface. The left sidebar has 'All Claims & Expert Appointments' circled in red. The main navigation bar has 'Active Expert Appointments' circled in red. The main content area is titled 'Filter Expert Appointments' and includes a 'Filter Expert Appointments' section with various dropdown menus and input fields. A table below the filters shows a list of appointments with columns for Ref, UCR / Claim Ref, UMR / Policy Ref, Expert Organisation, Individual Expert, Fee Reserve/budget, Instruction Currency, Total Payment, Payments (GBP), Payments (USD), Payments (EUR), Erosion %, Status, Date created, and Received via API?.

Ref	UCR / Claim Ref	UMR / Policy Ref	Expert Organisation	Individual Expert	Fee Reserve/budget	Instruction Currency	Total Payment	Payments (GBP)	Payments (USD)	Payments (EUR)	Erosion %	Status	Date created	Received via API?
Instr-262	B5600MT4566	B5600MT4566	ABC Company	Tom McArthur (Registered)	8,000.00	GBP	-	0.00	0.00	0.00	0%	Open	Wed, 03 Jun 2020 09:22 am	No

## 6.4 How to add a document to an appointment

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

The screenshot shows the Gemini [Carrier] interface. On the left is a navigation menu with items like 'My Area', 'All Claims & Expert Appointments', 'Experts', 'Company MI and Dashboards', 'User Admin', 'Import Claims', 'User Guide', and 'Invoices and Payments Pipeline'. The main content area is titled 'Gemini [Carrier] -' and contains several sections: 'Lead Fee Reserve' (8,000.00), 'Lead Fee Reserve Currency' (United Kingdom Pound (GBP)), 'Erosion %' (0%), and a list of financial metrics like 'Total Defence', 'Total Coverage', etc. Below these are three sections: 'Instruction Documents' (with an 'Add Document' button circled in red), 'Tasks Linked To Instruction' (with an 'Add Task' button), and 'Instruction Comments' (with an 'Add Comment' button).

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

The screenshot shows the 'Add Document' modal form. It has a title bar 'Add Document' with a close button. The form contains a 'File' field with a 'Choose a file...' button circled in red, and a 'Description' text input field. At the bottom right are 'Cancel' and 'Save' buttons.

## 6.5 How to add a task to an appointment

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

The screenshot shows the Gemini [Carrier] interface. On the left is a navigation menu with items like 'My Area', 'All Claims & Expert Appointments', 'Experts', 'Company MI and Dashboards', 'User Admin', 'Import Claims', 'User Guide', and 'Invoices and Payments Pipeline'. The main content area is titled 'Gemini [Carrier] -' and contains several sections:

- Financial Summary:**
  - Lead Fee Reserve: 8,000.00
  - Lead Fee Reserve Currency: United Kingdom Pound (GBP)
  - Erosion %: 0%
  - Fee Payments vs Lead Fee Reserve (toggle)
- Total Defence:** -
- Total Coverage:** -
- Total Subrogation:** -
- Total Adjuster Fee:** -
- Total Disbursement & Expenses:** -
- Total Other Expert:** -
- Total TPA Coverholder Fee:** -
- Total Fee Spend:** -

Below these are three sections for adding content:

- Instruction Documents:** A table with columns 'File', 'Description', and 'Added by'. Below the table is a green 'Add Document' button.
- Tasks Linked To Instruction:** A table with columns 'Task Ref', 'Name', 'Description', 'Status', and 'Date created'. Below the table is a green 'Add Task' button, which is circled in red in the image.
- Instruction Comments:** A table with columns 'Comment' and 'Created By'. Below the table is a green 'Add Comment' button.

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'.

The screenshot shows the 'Add Task' form in the Gemini [Carrier] interface. The navigation menu is the same as in the previous screenshot. The main content area is titled 'Add Task' and has a breadcrumb trail: 'My Page > My Claims > My Expert Appointments > My MI and Dashboard > Expert Add Requests'. The form contains three input fields:

- Task Name:** A text input field.
- Description:** A text input field.
- Status:** A dropdown menu with the text 'Please select...'.

At the bottom right of the form is a green 'Save' button, which is circled in red in the image.

## 6.6 How to add a comment to an appointment

It may be useful for an adjuster to add a comment to the claim file within GEMINI. To do this, select 'Add Comment' within the instruction.

The screenshot shows the Gemini [Carrier] interface. On the left is a navigation menu with 'My Area' highlighted. The main content area is divided into three sections:
 

- Financial Summary:** Lead Fee Reserve (8,000.00), Lead Fee Reserve Currency (United Kingdom Pound (GBP)), and Erosion % (0%).
- Instruction Documents:** A table with columns for File, Description, and Added by. Below the table is an 'Add Document' button.
- Tasks Linked To Instruction:** A table with columns for Task Ref, Name, Description, Status, and Date created. Below the table is an 'Add Task' button.
- Instruction Comments:** A section with a table for Comment and Created By. Below the table is an 'Add Comment' button, which is circled in red.

The system will show a comments box where the user can add their comment. Once you have done this click 'Submit'.

This screenshot shows a modal dialog box titled 'Add Comment'. It contains a text input field for the comment and a green 'Submit' button, which is circled in red. The background shows a dimmed view of the Gemini [Carrier] page.

### 6.7 How to edit, close or cancel an appointment

Select My Area -> My Expert Appointments -> then select 'Edit' on the appointment you wish to edit, close or cancel.

The screenshot shows the 'My Expert Appointments' page. The navigation menu on the left has 'My Area' circled in red. The main content area includes:
 

- Navigation:** 'My Expert Appointments' is circled in red in the top navigation bar.
- Filter Appointments:** A section with various dropdown filters for Instruction Ref, Status, Expert Organisation, HQ/Branch, Individual Expert, and Date Created/Modified.
- Table:** A table listing appointments with columns: Ref, UCR / Claim Ref, UMR / Policy Ref, Expert Organisation, Individual Expert, Currency, Fee Reserve/budget, Total Fee Spend (USD), Erosion %, Status, Date created, and Received via API?.

 The 'Edit' button in the last row of the table is circled in red.

You can then change the status to 'Closed' or 'Cancelled' along with details for the instruction and then click 'Save Expert Appointment' to save.

*Please note: You cannot cancel an appointment if a payment has been made to the Expert. The system will only give you the option to close the appointment.*

The screenshot displays the 'Add Expert Appointment' form in the GEMINI system. The form is titled 'Add Expert Appointment to ( Policy B66584 - Claim B66584 )'. It contains various fields for appointment details, including 'UCR / Claim Ref', 'Insured / Released', 'Loss Name', 'Claim Status', 'Loss Location', and 'Date of Loss From'. A red circle highlights the 'Status' dropdown menu, which is currently set to 'Open'. The dropdown options are 'Open', 'Cancelled', 'Closed', and 'Open'. The 'Save' button is visible at the bottom right of the form.

## 7.0 Manual Instructions and Fees

As the Carrier, you can submit claim, instruction, and invoice data to the GEMINI Helpdesk ([GEMINIHelpdesk@Ecliptic.tech](mailto:GEMINIHelpdesk@Ecliptic.tech)) for the purpose of processing *ad hoc* fees. The fees will still be processed through ECF CLASS however the GEMINI team will manually create the claim, instruction, and invoice within the system.

This may be useful for instances where it is not feasible/efficient for yourself to create the claim and instruction in GEMINI. This service can be utilised for edge-case instances where a fee needs to be paid, such as, but not limited to, the below scenarios:

- The Expert is not onboarded onto GEMINI and is unlikely to be appointed again
- An ad hoc refund is required
- A final fee needs to be paid
- Partial collections (Due to Lloyds functionality, this is only in scope for LIRMA and ILU claims)

You can access template forms showing the requisite claim and instruction data required for the GEMINI team to carry out this service by either:

- Contacting the GEMINI Helpdesk ([GEMINIHelpdesk@Ecliptic.tech](mailto:GEMINIHelpdesk@Ecliptic.tech))

- Accessing the 'Help & Support' tab in GEMINI.

## 8.0 Invoice Batching

Expert invoices can be batched together within GEMINI for processing on a single transaction in ECF CLASS. Experts can create and submit their own batches and an automated batching mechanism is in place to batch singular invoices together once they are submitted to the system.

Invoices must be submitted to the same GEMINI instruction to be eligible for batching and will not be batched across multiple Expert organisations.

As the Carrier, you can reach out to the GEMINI Helpdesk (GEMINIHelpdesk@Ecliptic.tech) to request to be opted out of having invoice batches created for claims where your Carrier organisation is the lead, or to request changes to the below configurations:

- Invoice Batch Timer:
  - Defaulted to 12 calendar hours, this is the time that must elapse from the point of submission of an invoice, until the batch is 'finalised' and ready to be processed.
- Multi-Currency Batches: On/Off
  - Defaulted to 'On', this will mean batches can include a maximum of three different currencies.

## 9.0 Payment and MI & Dashboards

### 9.1 Payments

All invoices for an instructed Expert will now be uploaded to GEMINI for processing. This will not impact your current process to approve fees. This will still be done via ECF or your writeback system. Once your appointed Expert uploads their invoice into GEMINI, this will be processed by ECLIPTIC under a Parallel UCR, and the funds collected via central settlement, before being sent directly from GEMINI to the claims Expert in the bank account they set up as part of the registration process, and which they selected when they uploaded the invoice.

This will allow managing agents to have clear visibility on Expert spend and can access this via the reports below.

### 9.2 MI & Dashboards

This tab displays additional reports and filters for analysis of Expert spend across your own portfolio of claims and appointments.

*Please note: only paid invoices will show within your MI and Dashboards.*

Please find attachment with full listing of reports



## Carrier Reports - GEMINI.pdf

To view reporting select 'My Area' -> 'My MI and Dashboard'.

**Erosion Analysis**

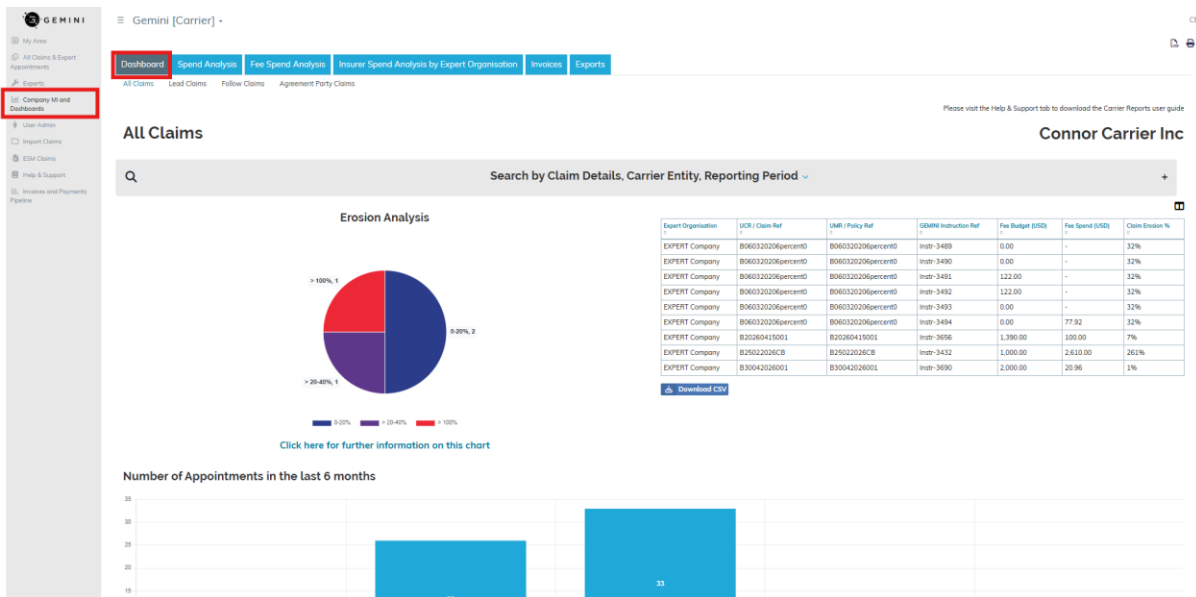
Expert Organisation	UCR / Claim Ref	SMR / Policy Ref	GDMM Instruction Ref	Fee Budget (USD)	Fee Spend (USD)	Claim Erosion %
EXPERT Company	B25022026CB	B25022026CB	Inst-3432	1,000.00	2,610.00	261%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3489	0.00	-	32%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3490	0.00	-	32%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3491	122.00	-	32%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3492	122.00	-	30%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3493	0.00	-	32%
EXPERT Company	B060320206percent0	B060320206percent0	Inst-3494	0.00	77.92	32%
EXPERT Company	B20260415001	B20260415001	Inst-3656	1,390.00	100.00	7%

**Number of Appointments in the last 6 months**

Month	Number of Appointments
Month 1	20
Month 2	14
Month 3	8

The user will also have access to their company MI and Dashboard which can be selected on the tab bar. The user will have the choice to report on All, Lead, Follow or where you are the agreement party.

Select 'Company MI and Dashboards'



### 9.3 Invoices and Payments Pipeline

This tab will show you high level payment reports for:


- All outstanding invoices within the payment process, the status their showing and the value of total invoices at each status
- All paid invoice and show the maximum, minimum and average time it has taken to have an invoice paid

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

Please find attachment with full listing of reports

To view our payment reports reporting select ‘Invoices and Payments Pipeline’ and then either ‘Invoices and Payments Pipeline (Awaiting Payment)’ or ‘Invoices and Payments Pipeline (Paid)’.

  
 My Area  
 All Claims & Expert Appointments  
 Experts  
 Company M and Dashboards  
 User Admin  
 Import Claims  
 Invoices and Payments Pipeline  
 Invoices and Payments Pipeline (Awaiting Payment)  
 Invoices and Payments Pipeline (Paid)

≡ Gemini [Carrier] -

Invoices and Payments Pipeline (Awaiting Payment)    Invoices and Payments Pipeline (Paid)

### Invoices Awaiting Payment

Country	<input type="text" value="All"/>	High Level Class of Business	<input type="text" value="All"/>
Expert Type	<input type="text" value="All"/>	Generic Class of Business	<input type="text" value="Select High Level Class of Business first..."/>
Expert Sub Category	<input type="text" value="Select Expert Type first..."/>	Risk Code	<input type="text" value="Select Generic Class of Business first..."/>
Company	<input type="text" value="All"/>	Submitted Last X Days	<input type="text"/>
Expert User	<input type="text" value="Select Company first..."/>	Outstanding for > X Days	<input type="text"/>

