

MIGRATED DATA

In PolicyPro by Sapiens



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Data that was converted into Sapiens from BriteCore include:



POLICYPRO

All policies/policy terms that have been in-force during some point within the two years prior to launch date will be moved to **PolicyPro**.

1. This includes any/all endorsements, reinstatements, rewrites, and other transactions in that time.
2. This includes any/all billing activity during that time.
3. This includes any documents (attachments) associated with those policies.
 - a. Example: PolicyPro > Document Management > Documents > Conversion Documents
4. Policy/billing information from before the two-year window will be moved to **IntelligencePro** for analytics purposes.
5. Documents for policies which are moving to **IntelligencePro** will still be accessible via **DocumentPro**.

CLAIMSPRO

All Open Claims and any claim that was open within the 12 months prior to launch date will be moved to **ClaimsPro**.

1. Any claims not included in the one-year window will be moved to **IntelligencePro** for analytics.
2. Documents for claims which are moving to **IntelligencePro** will still be accessible via **DocumentPro**.
 - a. Example: PolicyPro > Document Management > Documents > Conversion Documents

CUSTOMERPRO

All customers (contacts) associated with a Policy or Claim in BriteCore will be migrated to **CustomerPro** and will be viewable using the **Search** feature in **PolicyPro**.

MEMBERSHIP

All Memberships, that had been active in the 12 months prior to launch date, will be moved to **PolicyPro**. This includes all Memberships from both the BriteCore and Legacy systems.

If a customer **HAD** a membership that has expired, the customer will get a new membership number if they decide to become a member again.

The most exciting change is that **AFR Memberships** are now available for agents to create and view within the Sapiens system, similar to any other policy. Agents will be able to update memberships for insureds by completing address changes, add household members and creating associated policies directly within Sapiens.

All memberships will need to be created within the Sapiens system before submitting any AFR insurance policy, including policies not currently in Sapiens. This includes all Auto and Farm and Ranch policies in the Legacy system. If a legacy policy is submitted without issuance, the AFR home office will advise the agent that they are unable to issue the policy until the membership has been completed within the Sapiens system. Please see the [Membership](#) training for more information.