

Extended Data Q&A Overview

December 2024

Executive Summary

- The purpose of this document is to outline the **what** and **why** of Extended Data Q&A in Whitespace, and the **how** we plan to provide this service to brokers and carriers.
- This document will cover:
 - An overview of what Extended Data Q&A
 - Terminology on the components of Extended Data Q&A.
 - Whitespace service design for requesting of new questions, question sets and answer sets.
 - Detail on the triaging processes to be undertaken by Whitespace.
 - How Whitespace will deliver Q&A requests
- This document will act as a framework to guide and inform broker and carrier implementations of this data to enable our Clients to plan effectively and deliver quality results quickly.



What is Extended Data Q&A?

- New Whitespace structured data category that goes beyond Defined Data.
- Question and Answer (Q&A) data that supports the information contained in the Market Reform Contract (MRC) but that is not negotiable as part of the placing process and not shared with all participants on a contract by default.
- Available in structured format to a capacity provider via the Whitespace platform and APIs.
- May be configured as broker-specific or Whitespace core Q&A.



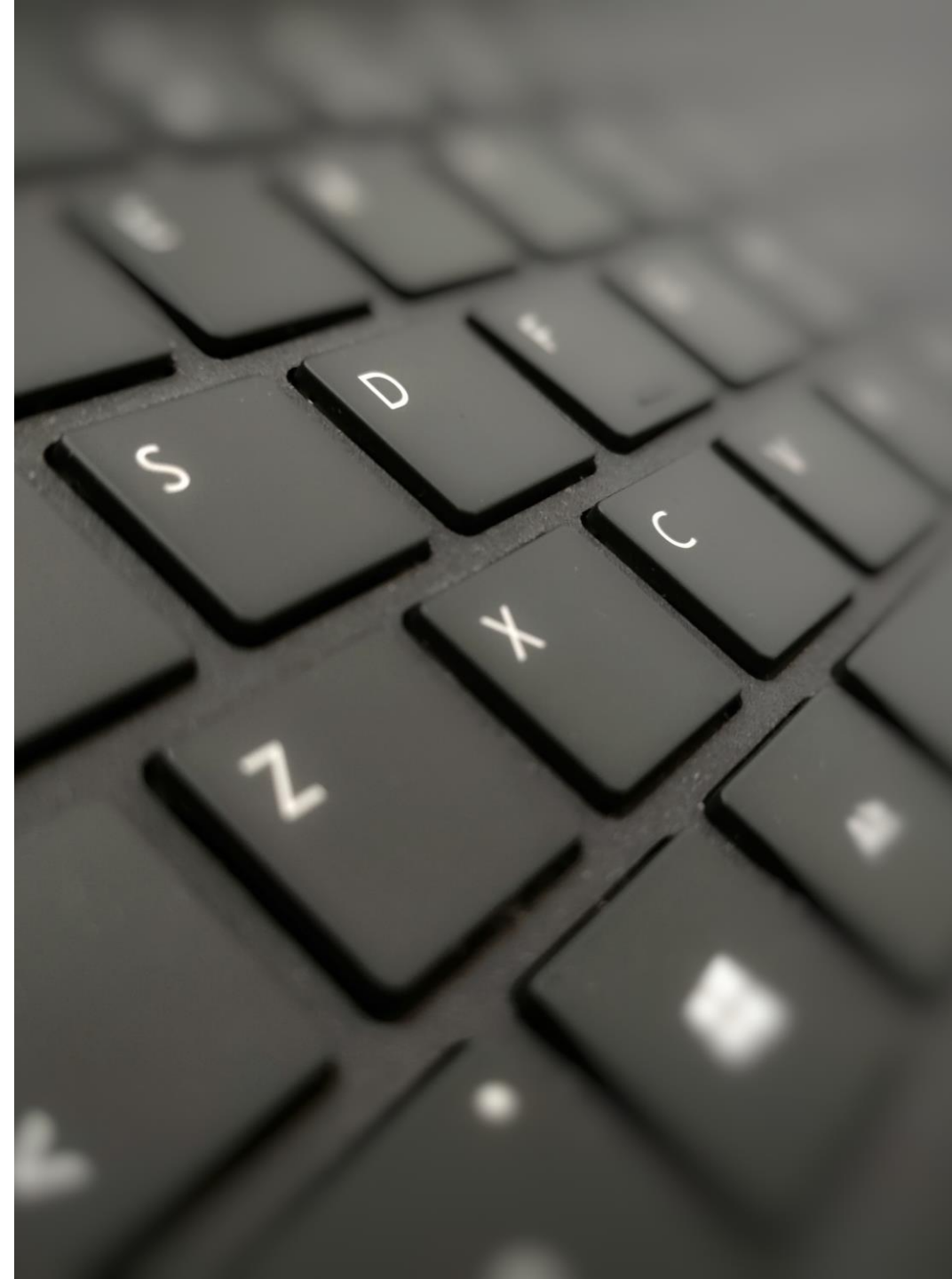
What makes up Extended Q&A?

- **Question:** A question is made up of a unique ID, one or more question phrasings, and permitted answers
- **Alternative Questions:** a question can have multiple phrasings all with the same intent, unique ID, and permitted answers.
- **Answer Type:** an answer type defines how the answer must be provided - Yes/No, single-select, multi-select etc.
- **Question Set:** a list of questions and their permitted answers grouped by a common theme e.g., line of business.
- **Question Category:** questions can either be Whitespace Core or broker-specific.
- **Conditions:** a condition is the business logic associated with the selected answer to a question that informs a subsequent, dependent question
- **Enabling Question:** the question containing business logic that informs a dependent question, should a condition be met, e.g., a selected answer
- **Dependent Question:** the question that is hidden and only shown when the condition is met on of an enabling question



Configuration requests

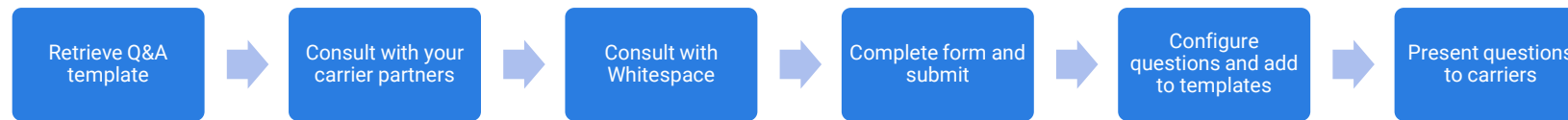
- Types of requests:
 1. A new question and its permitted answer(s)
 2. An alternative question
 3. A new answer value to an existing question
 4. A new question set (e.g., line of business) and its permitted answers
 5. Adding an existing question to a new or an existing question set
 6. Adding a new question that is conditional upon a Whitespace question
- Whitespace will review all incoming requests as part of a fortnightly process.
- All requests will go through a triaging process that will balance speed of implementation with a transparent methodology and clear guiding principles.
- Triage refers to the activities of reviewing Broker submissions and determining the value of promoting a Broker-submitted question into the Whitespace core list of questions.



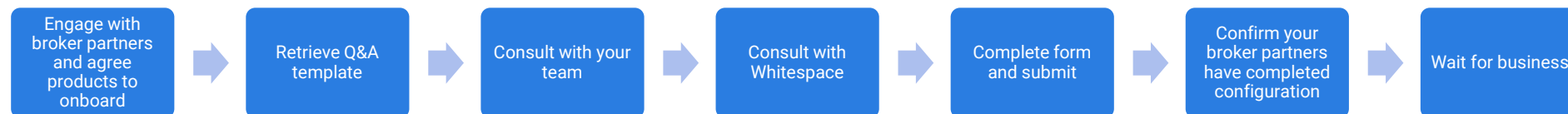
Configuration requests

- Each category of supported service request and its associated triage by Whitespace is detailed on the slides that follow.
- The request template is available via the Whitespace Q&A Request Template link on https://apidocs.whitespace.co.uk/Whitespace_Questionnaire_Request_Template.xlsx
 - The template contains useful examples that will help complete accurately and improve the speed of implementation.
- Service requests can be made by submitting the completed template to the dedicated mailbox: structureddatarequest@whitespace.co.uk

Brokers



Carriers



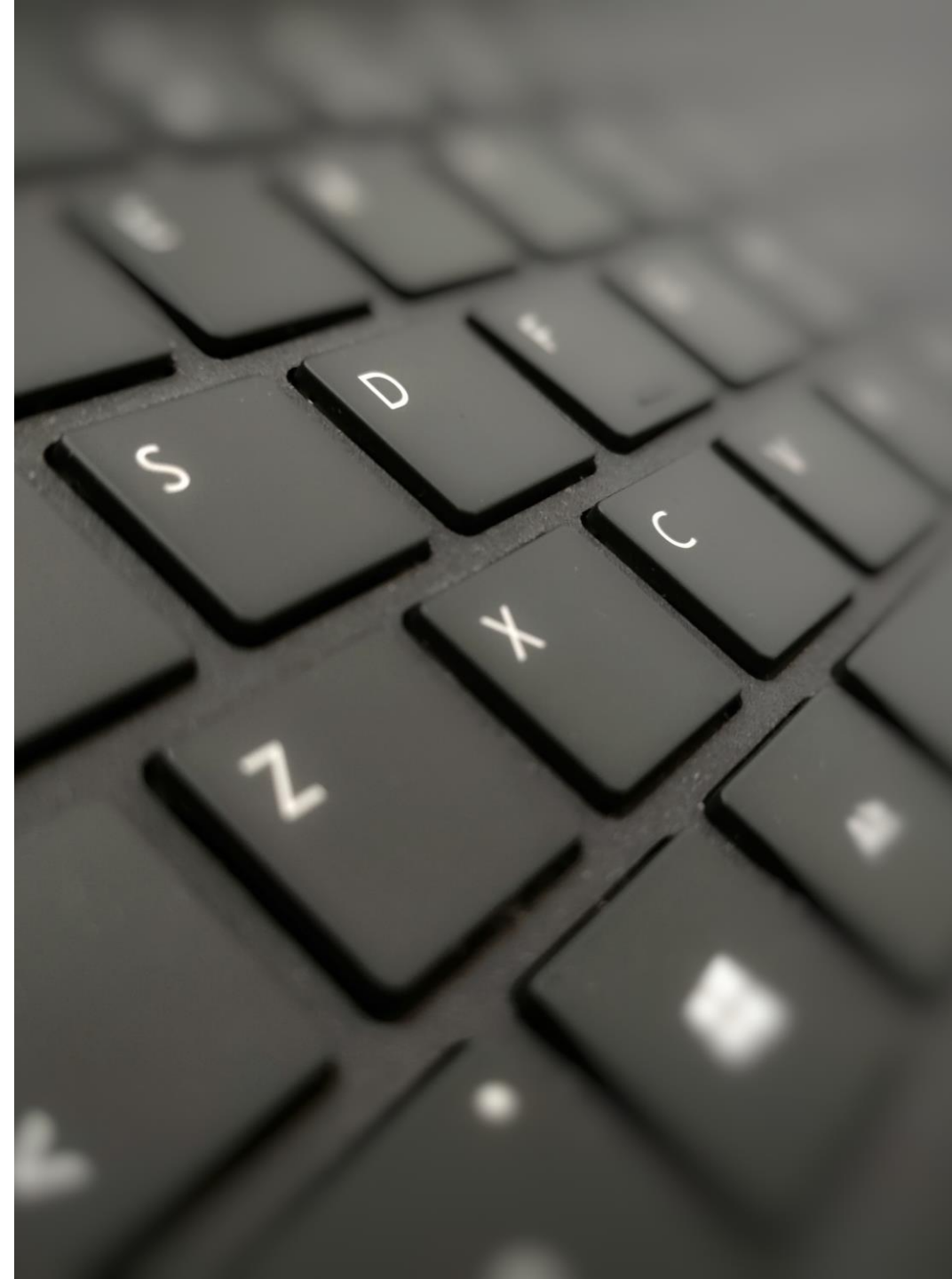
Triaging process

- The purpose of this document is to outline the **what** and **why** of Extended Data Q&A in Whitespace, and the **how** we plan to provide this service to brokers and carriers.
- The section that follows will cover:
 1. A new question and its permitted answer(s)
 2. An alternative question
 3. A new answer value to an existing question
 4. A new question set (e.g., line of business) and its permitted answers
 5. Adding an existing question to a new or an existing question set
 6. Adding a new question that is a conditional question



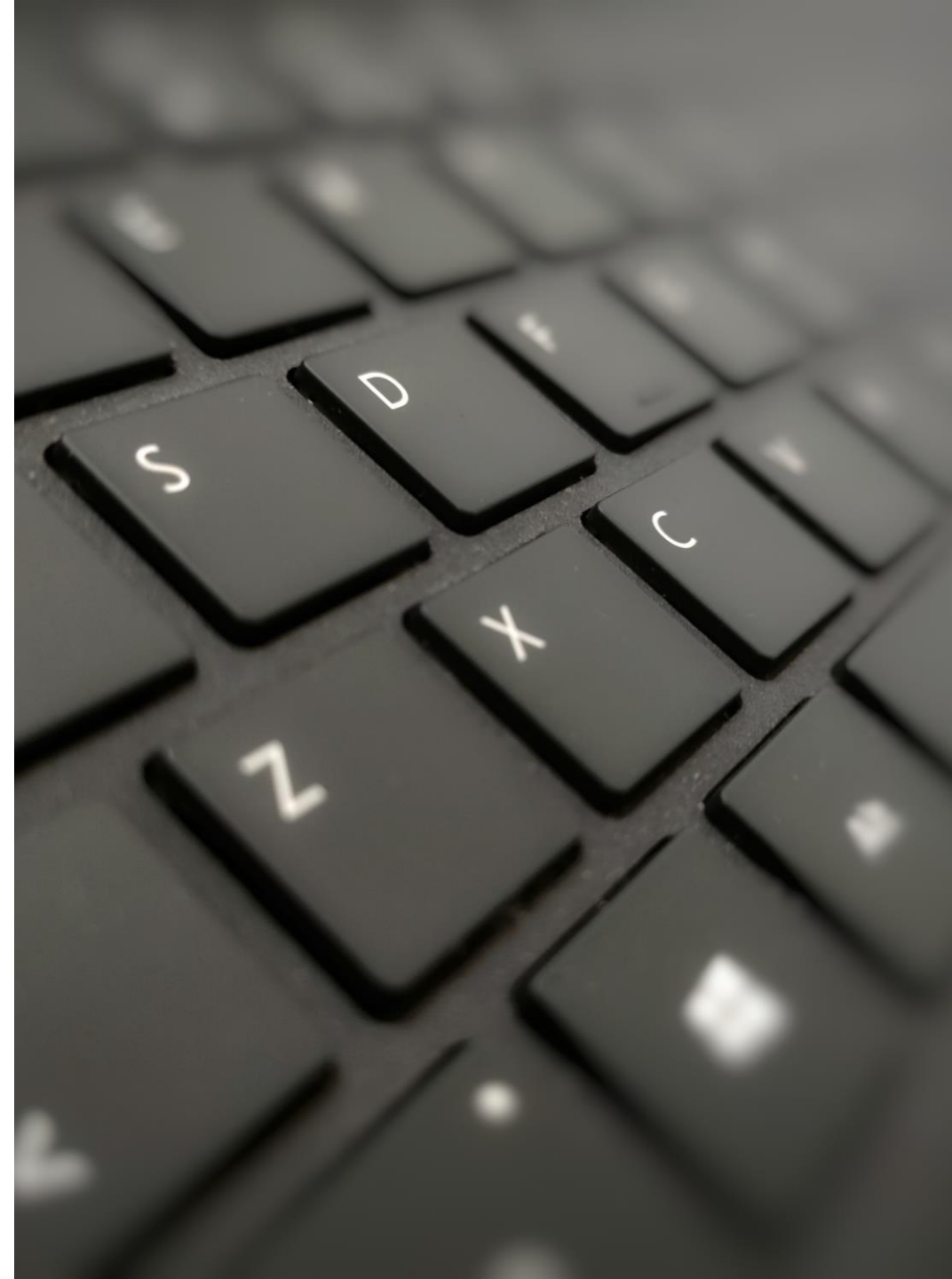
1. Triaging a new question

- Whitespace will review requests for a new question against the catalogue of all existing and previously submitted questions. The review will consider the following:
 - Does the question already exist with the proposed phrasing or different phrasing (both in the Whitespace and Broker-specific configuration documents)?
 - Does the question reference sensitive information that is only applicable to specific to that Broker?
 - Is the question already being used by the Broker and therefore used by other systems?
 - Is the answer type appropriate to the question being asked?
 - Does a Whitespace tag already exist for the question?
 - Does the question have a conditions (other questions) associated with it?
 - What is the requested answer type and, if it's a list of values, what values does the list include?
 - For answer lists, do they align and should they align to global reference data, or global (re)insurance, or London Market (re)insurance data standards?



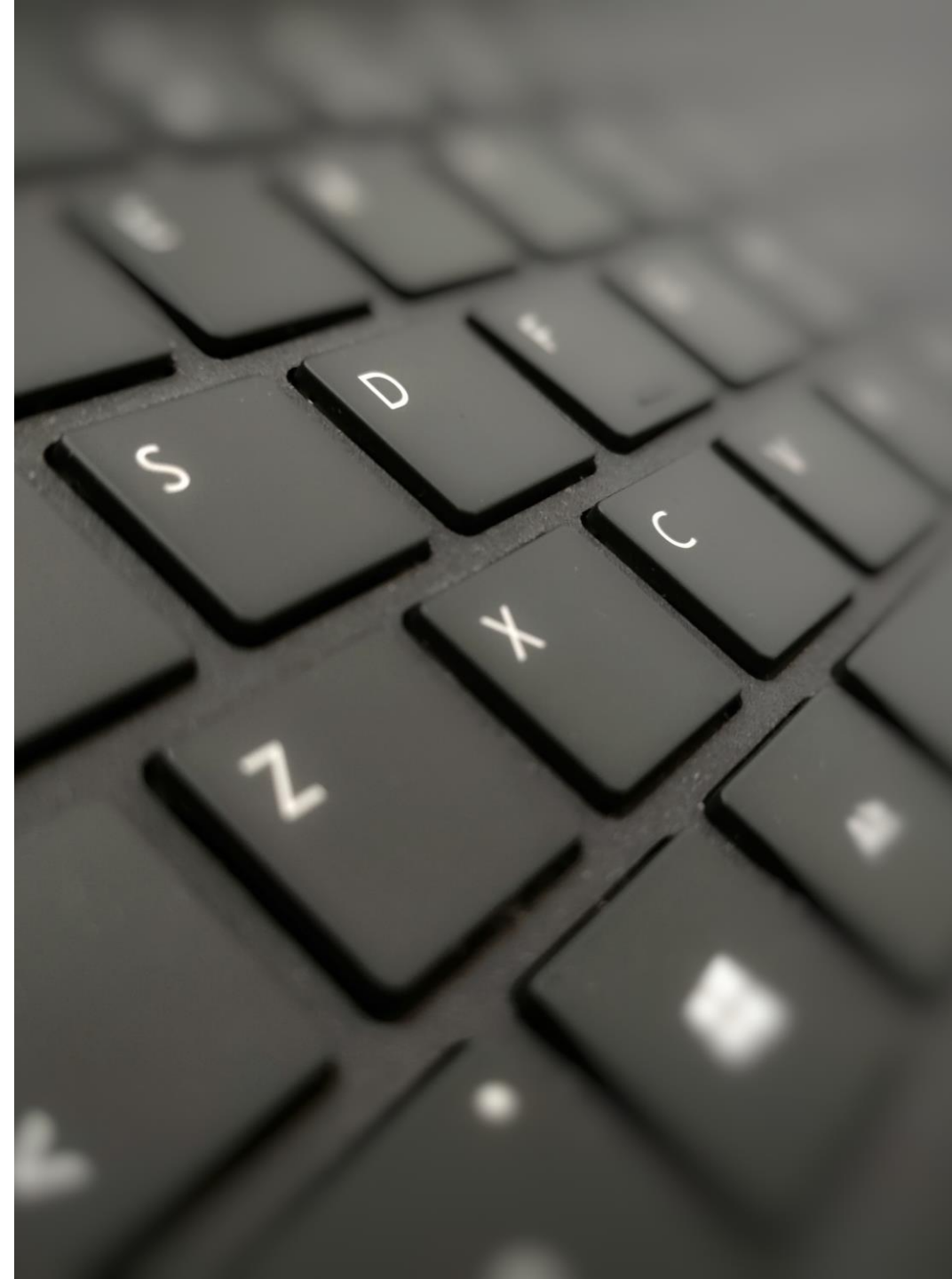
2. Triaging an alternative question

- Whitespace will review requests for an alternative question using the following criteria:
 - What is the Broker's intent with the new phrasing of the question?
 - Does the suggested phrasing change the intent of the original question?
 - Is the permitted answer for the original question still applicable to the new phrasing?



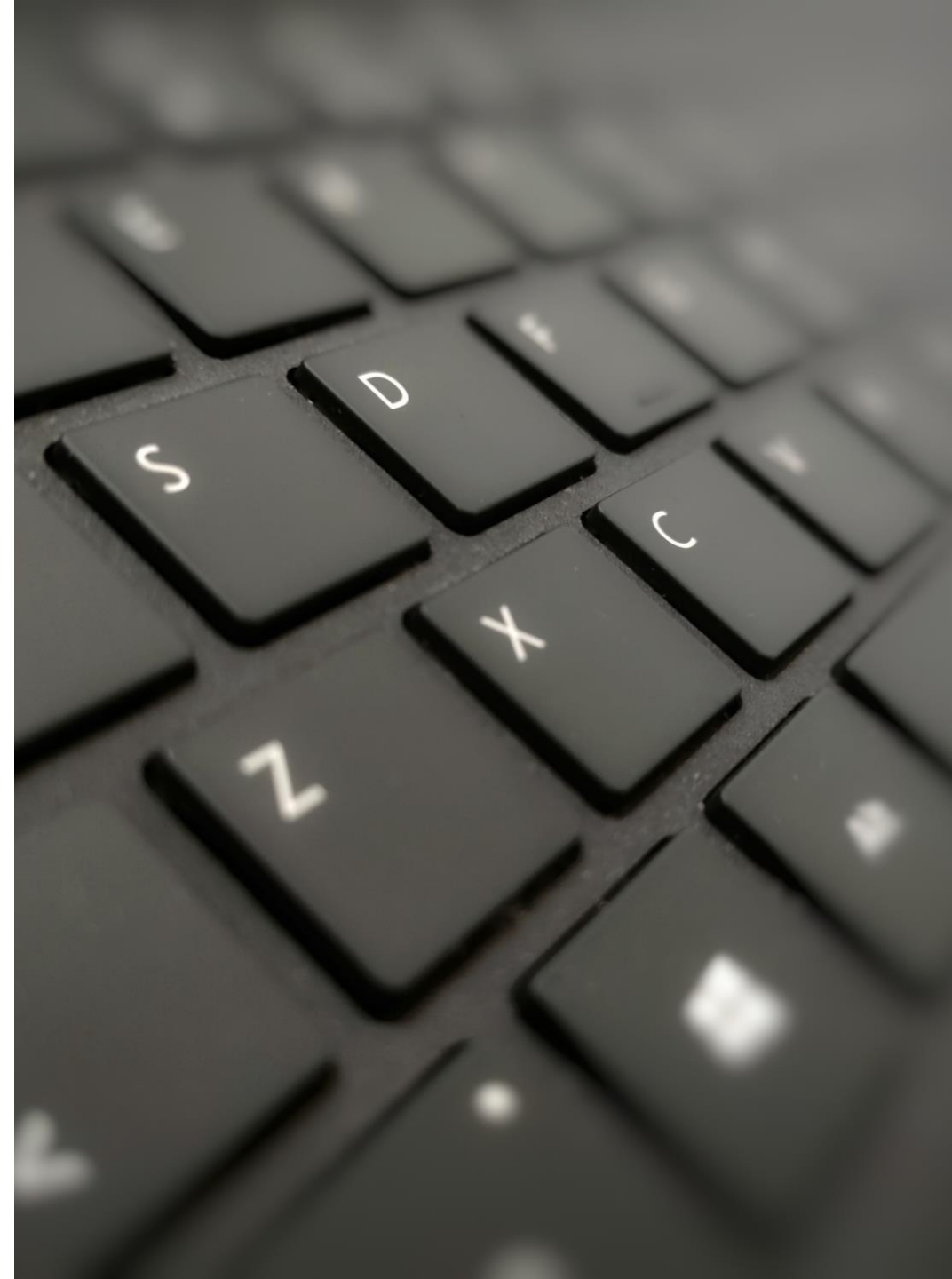
3. Triaging a new value

- Whitespace will review requests for a new answer value using the following criteria:
 - Does the value correspond with the business context of the question being asked?
 - If not, does it warrant a new question or alternative phrasing to the existing question?
 - Does the value introduce the need for a new answer type (i.e. from single-select to multi-select, or from Yes/No to single-select)?
 - Does the new value an amalgam of two existing answers?
 - If so, what are the business reasons for introducing the new value?
 - For answer lists, do they align and should they align to global reference data, or global (re)insurance, or London Market (re)insurance data standards?
 - If the question is Whitespace core and already aligns to a reference data list, would this new value introduce redundancy or integrity risk for the question?



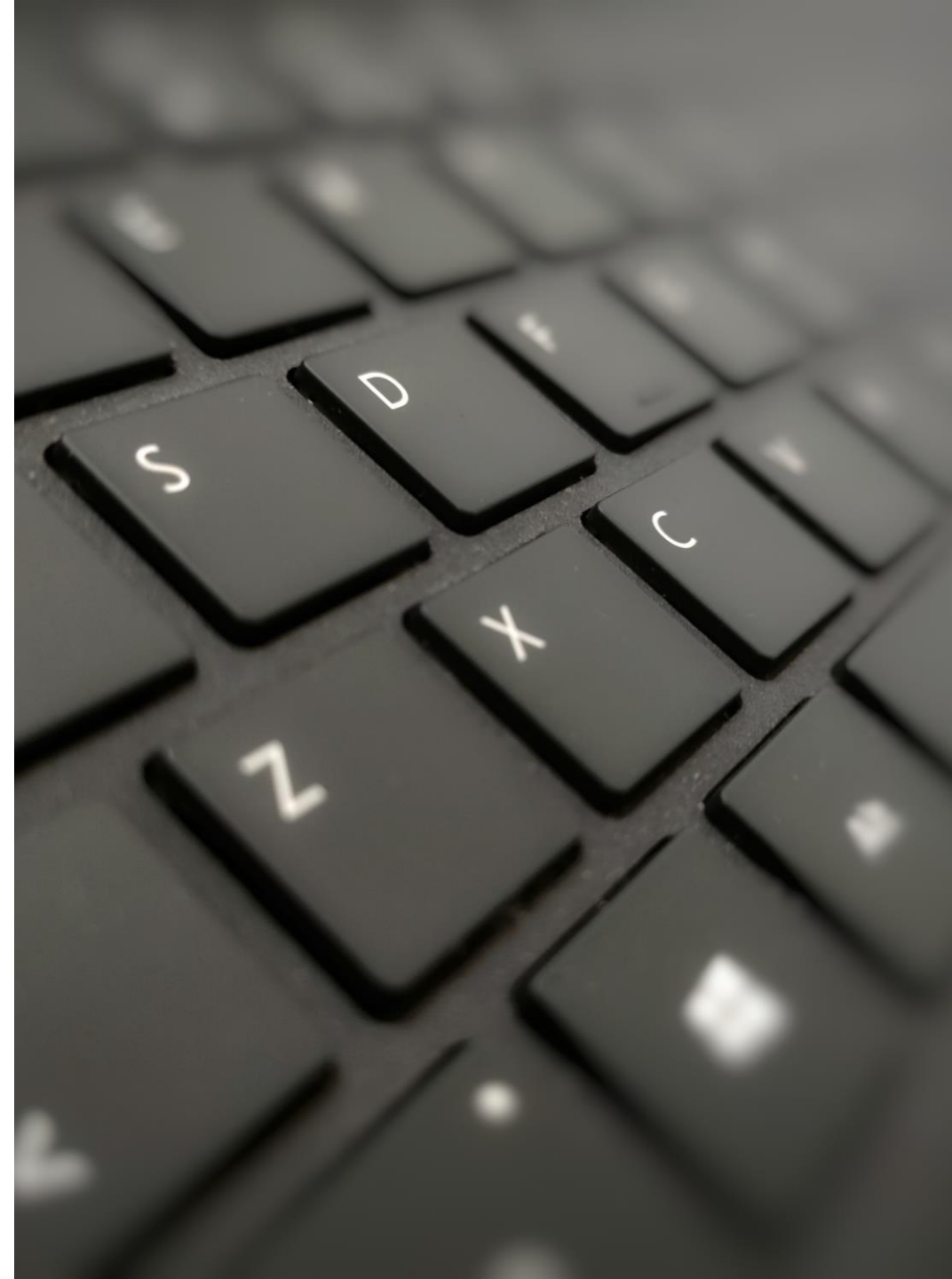
4. Triaging a new question set

- Whitespace will review requests for a new question set using the following criteria:
 - Can the question set be associated to a line of business (e.g. marine) or placing location (e.g. North America) or placement type (e.g. treaty), or a combination of these?
 - Is the question set aligned to a specific product, a group of products, or intended to be agnostic of products?
 - Does another question set already exist, or closely align with the new set?
 - Can the questions contained in the chosen question set, be used in other sets?
 - Are there any condition restrictions associated with questions within the set that would conflict with its use as Whitespace core?



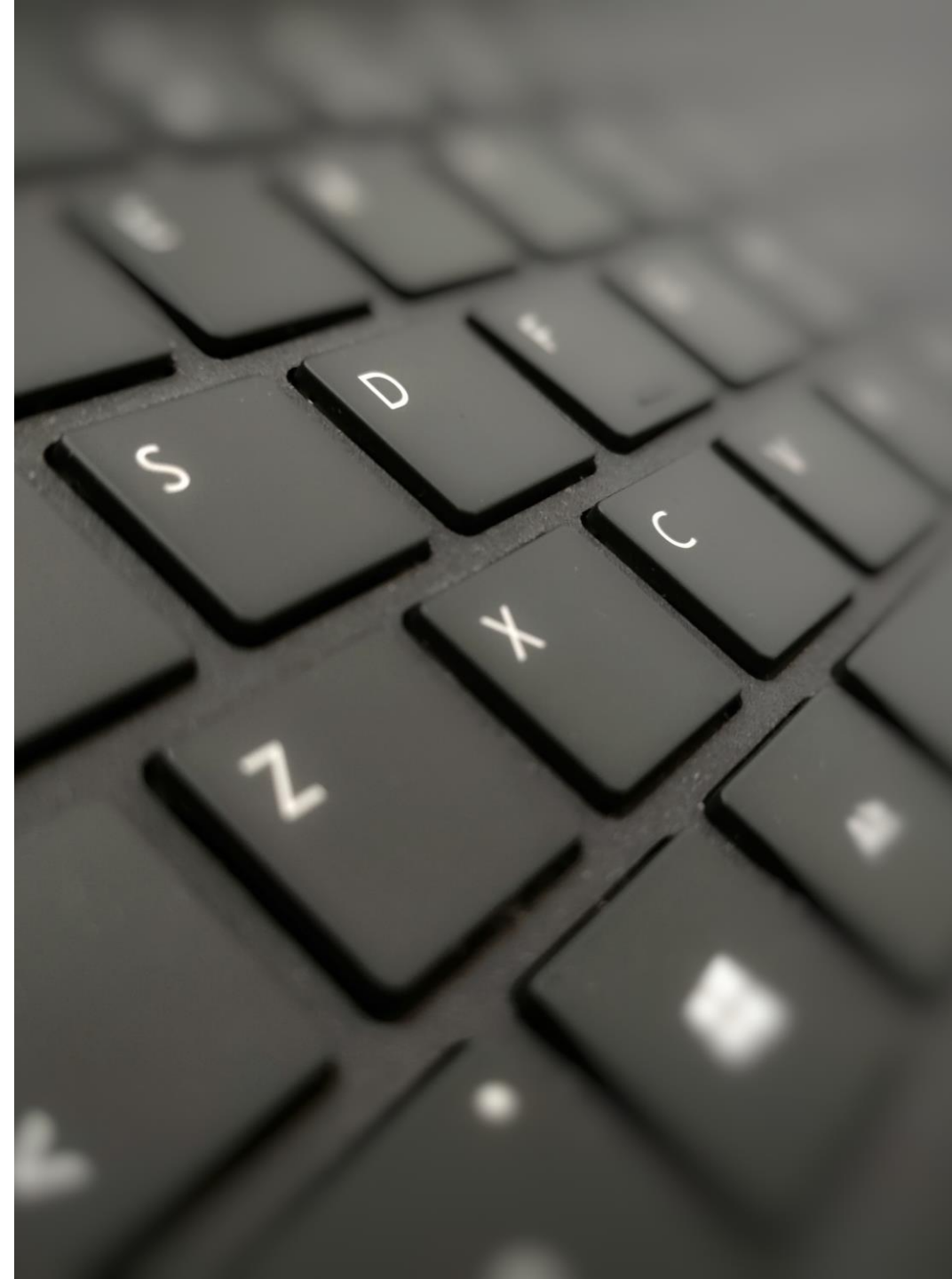
5. Triaging existing questions

- Whitespace will review the whole question catalogue quarterly to determine applicability of the question to its place on the platform. This will cover:
 - A question's suitability to its set.
 - Has the introduction of other questions or question sets by the broker changed the business use of this question?
 - Has the introduction of new values or phrasings impacted its original intent to be more restrictive or more flexible in use by other question sets?
 - Is it still aligned to a specific product, a group of products, or intended to be agnostic of products?
 - A question's suitability as broker-specific and whether it can be promoted to Whitespace core.
 - Does it align to Whitespace's data principles?
 - Is there buy-in from other members of the Whitespace community?
 - Alignment from other members of the Whitespace community?
 - Have contributions from the Whitespace community necessitated the need to consolidated different questions into a single question with different phrasings, and if applicable with a consolidated answer list?



6. Triaging a new conditional question

- Whitespace will review requests for a new question, where that question is conditional upon another question, by considering enabling question's category:
 - Is the enabling question already implemented and contained in Whitespace Core category?
 - If so, can this be accommodated by a separate broker-specific question?
 - Does introducing the dependency improve a responder's ability to answer accurately and the requisite degree of understanding and context?
 - Does the enabling question contain the correct phrasing, i.e. will the responder be aware of the need to answer subsequent questions for a given answer to the enabling question?
 - Does the enabling question contain appropriate answer options?



Delivering Configuration requests

- Fortnightly configuration sprint releases planned
- New requests reviewed at the start of each sprint
- Configuration requests triaged (as per previous) and shaped into Whitespace and/or Corporate specific Q&A configuration additions
- Requestor is notified of proposed additions
- Whitespace Q&A configuration:
 - Whitespace Q&A will be visible in Provisional WS Data Dictionary
 - Whitespace Q&A released to Production and Sandbox at the same time
- Corporate Q&A configuration:
 - Following agreement from requestor of proposed Corporate Q&A additions, changes released to Sandbox
 - Requestor to test and confirm on Corporate Q&A additions and provide confirmation for deployment to Production

