MorganAsh

The MorganAsh
Resilience System -
XPLAN / IRESS integration
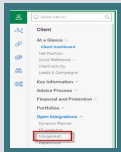
A guide
For IRESS users

The MorganAsh Resilience System (MARS) is a **cloud-based system** to **assess, manage, track and report on consumer characteristics** to enable compliance with **FCA vulnerability and Consumer Duty regulations.** This API integration enables data on individual consumers to be passed to the MARS tool, and the **MARS Resilience Certificate passed back to Xplan/IRESS.**

MARS requires a consumer's name, DOB and email as a minimum, but also address, and contact details can also be passed over. The **MARS Resilience Certificate** is a PDF and includes a statement of the **Consumers Resilience**, the date the assessment was made, and any treatments recommended. This is intended to be kept with the file for the consumer's audit purposes.

This document will walk you through the process of **loading your XPlan/IRESS clients into the MorganAsh MARS portal,** creating a **MARS case,** and obtaining a **MARS Rating Report** (Certificate) back into your **XPlan/IRESS system.**
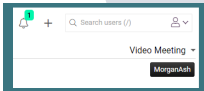
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From your XPLAN/IRESS account, choose the Client you wish to load into MARS... expand the 'open integrations' tab and select MorganAsh.
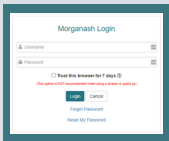

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Click on the MorganAsh Button.

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Morganash Login

- Username
- Password

○ Trust this browser for 7 days ⑦

This option is NOT recommended when you are using a shared or public pc

[Login] [Cancel]

Forgot Password

Reset My Password

You will be then prompted to log into the MorganAsh MARS system using your **existing MorganAsh MARS login.**

Please enter your **MorganAsh login details.**

These will be provided to you when you **open your MorganAsh MARS account.** You must have a MorganAsh account before you can access the MARS system.

To enquire and register, please email:
info@morganash.com

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When you login with your MARS account, a **first-time connection** between **XPlan and MorganAsh** must then be **secured**. You will need to provide the following details so so **client data can be loaded into MARS.** Enter the credentials of a valid XPlan/ IRESS user who has access to your chosen Client.

You should only need to provide this username and password once. Please **consult your own IT department** or IRESS if you are unsure what credentials to use.

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Open a connection to Morganash ⑦

Xplan Username

Xplan Password

✓ Connect

After entering these **credentials**, you will be prompted for some **MARS-specific information.** Please provide the following details for your client/consumer evaluation.

Assessment options

As **XPLAN** may encounter cases where the client's **Date of Birth, Gender, and Email** are missing. Please note that **MARS** requires **all of these** in order for the case to load.

Please indicate whether the relationship with the consumer is an '**Enquiry**' in preparation for a '**Contract**' or an existing '**Customer**'.

What to include in the assessment:

Financial data ✓

Protected characteristics data ✓

Identity data ✓

Will and Lasting Power of Attorney ✓

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Firms can configure MARS with various options. When using the IRESS integration, **firms have the option to let each case be configured individually** or to **use the set options set by the firm.**

Which **product** is of concern

The status of the case - i.e., **enquiry, contract or existing customer.**

Choice between three assessment lengths: **short, medium, and extensive.**
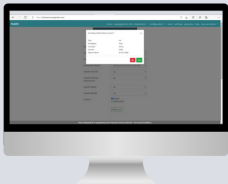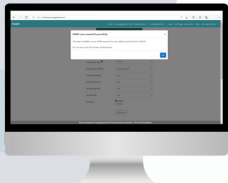
The **assessments** can be completed by **the user, emailed to the consumer,** or **scheduled with a MorganAsh Nurse.**

To demonstrate, we show **how all options are left to the individual case to be selected**; in practice, we expect most options to be **configured at the firm level**, reducing the need for manual intervention when passing cases from **MARS to IRESS**.

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You will be prompted to **confirm** that this is the **Xplan/IRESS Client** to load into MARS after clicking "**continue.**"
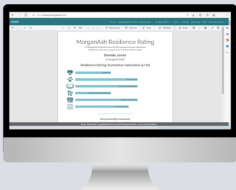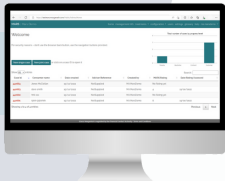
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A confirmation will be shown once the client has been loaded and the **MARS case** has been created. At this point, you have the option of **closing the window or adding a new client** by following the same procedures.

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If you visit the MARS portal, you will see that the client's case is now listed under your MARS account.
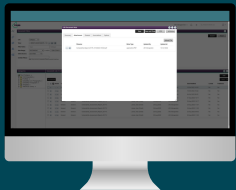

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The **Vulnerability Assessment Report (Certificate)**, which contains the **MARS rating**, will be automatically uploaded back to your **XPlan / IRESS account** and can be located under **'Notes and Documents area'** for the client. As a result, you do not need to enter the **MARS site** to continue.

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The **assessment report** can be downloaded under the attachment tab.

Here to help

If you have any questions, please contact one of our friendly team members, who will be happy to help.

✉ **CustomerServices@morganash.com**

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