AAOS Project for ACME Insurance Solutions

420-436-VA: Deliverable 4

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"Il semble que la perfection soit atteinte non quand il n'y a plus rien à ajouter, mais quand il n'y a plus rien à retrancher"

- Antoine de Saint-Exupéry

Summary Description of the Client (Revised)

ACME Insurance Solutions is a leading player in the Canadian life and health insurance industry, serving millions of Canadians. The company is committed to providing efficient services while meeting customer expectations for rapid claim processing. With a focus on productivity, ACME seeks technological solutions to enhance its operations. Since the last deliverable, our understanding of ACME's client profile has remained consistent. However, we have gained deeper insights into their specific needs and preferences through ongoing discussions and interactions.

Business Problem

The primary business problem that the new system aims to address is the inefficiency and error-proneness of ACME Insurance Solutions' manual claim submission and review process. This manual process has emerged as a significant bottleneck, resulting in delays in claim processing and customer dissatisfaction. The new system seeks to modernize and automate this process, improving efficiency while ensuring accuracy. With a better understanding of the client's needs, we now recognize the critical importance of enhancing time efficiency and resource utilization to enhance the overall customer experience. This problem statement remains consistent with our initial understanding, but our ongoing discussions have provided further clarity on specific pain points and areas for improvement.

Narrative Description of the Future Information System

In envisioning the future information system for ACME Insurance Solutions, we have crafted a solution shaped to meet the distinct needs of its users. Central to this vision are two primary roles: the User and the Administrator (Owner), each assigned specific responsibilities within the system.

User Role

At the heart of our system lies the User role, representing all individuals engaging with the platform. Whether authenticated or not, users will navigate the system to perform various actions, such as submitting claims, accessing account information, and seeking support when necessary.

Administrator Role

The Administrator, like the system's manager, has important privileges for controlling system operations and user management. They can create, delete, and assign roles to users, ensuring the system runs smoothly and follows all rules.

User Interaction

Users will find the system intuitive and user-friendly, facilitating seamless navigation and interaction. From securely submitting claim documents to accessing real-time updates on claim statuses, users will enjoy a streamlined experience designed to enhance efficiency and satisfaction.

Administrator Functions

Administrators, the basis of system management, will wield a robust toolkit enabling them to review claim submissions, approve or deny claims based on policy criteria, and

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facilitate payments with precision and efficiency. Also, Administrators can categorize claims, assign processing teams, and monitor system performance through comprehensive metrics analysis.

System Features

Our system boasts an array of features designed to empower users and streamline operations. From automated notifications alerting users to important updates to a robust support ticket system facilitating seamless communication between users and admins, our platform prioritizes accessibility, responsiveness, and user-centricity.

Conclusion

In summary, our future information system embodies ACME Insurance Solutions' commitment to innovation, efficiency, and customer satisfaction. Through careful planning and meticulous design, we have crafted a platform prepared to revolutionize claim processing, empower users, and propel ACME Insurance Solutions to new heights of success and excellence.

Appendix 1 - Process for Obtaining User Stories

Initial Discussions

Held meetings with ACME Insurance Solutions to understand their current processes and challenges.

Identified key participants involved in the claims process.

Requirements Gathering

Conducted interviews and discussions with participants to gather requirements.

Captured feedback on pain points and desired improvements.

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Collaborative Refinement

Worked closely with the client team to refine user stories based on gathered requirements.

Ensured clarity and feasibility of each user story.

Documentation

Documented finalized user stories in a structured format.

Included clear titles, descriptions, and acceptance criteria.

Review and Approval

Reviewed user stories with the client team to validate accuracy and completeness.

Incorporated feedback and obtained final approval.

Continuous Communication

Maintained ongoing communication with the client team to address any questions or concerns.

Provided updates on the progress of user story development.

User Stories for Admins

As an admin, I want to be able to log in securely to the system.

As an admin, I want to review submitted claim documents for completeness and accuracy.

As an admin, I want to request additional information from customers if necessary.

As an admin, I want to have the ability to approve or deny claims based on policy criteria.

As an admin, I want to generate payments for approved claims accurately and efficiently.

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As an admin, I want to categorize claims based on urgency and priority for streamlined processing.

As an admin, I want to assign claims to specific processors or teams for efficient handling.

As an admin, I want to track the status of each claim in real-time to ensure timely resolution.

As an admin, I can view a claim and all associated interactions and add audit results.

As an admin, I want to automate routine tasks in claim processing, such as data entry or document verification, to improve efficiency.

As an admin, I want to archive historical claims data securely for regulatory compliance and future reference purposes.

As an admin, I want to provide self-service tools for customers to track the progress of their claims and upload additional documents as needed.

As an admin, I want to conduct regular user satisfaction surveys to gather feedback and identify areas for improving the claims processing experience.

As an admin, I want to implement role-based access controls to ensure that only authorized personnel can access sensitive claims data.

As an admin, I want to integrate AI-powered chatbots to assist users with frequently asked questions and reduce the workload on customer support staff.

As an admin, I want to streamline the process of onboarding new claimants by providing pre-filled forms and guided submission instructions.

As an admin, I want to conduct regular reviews of claim processing procedures and update them as needed to adapt to changing business requirements.

User Stories for Users

As a user, I want to log in securely to access the system.

As a user, I want to submit claim documents easily through the web application.

As a user, I want to receive timely updates on the status of my submitted claim via email or SMS.

As a user, I want to view the history of my past claims and their statuses.

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As a user, I want to be able to contact customer support for assistance with my claim through ticket support on the website.

As a user, I want to reset my password if I forget it securely through email verification.

As a user, I want to update my profile information if needed, such as contact details or address.

As a user, I want to receive notifications about important updates or changes in the system, such as policy revisions or system maintenance.

As a user, I want to access help documentation or tutorials to understand how to use the system effectively, including FAQs and user guides.

As a user, I want to easily request policy endorsements or modifications online without having to fill out lengthy paperwork.

As a user, I want to receive proactive alerts about potential risks or changes in my coverage that may affect my policy.

As a user, I want to have access to a virtual assistant or FAQ bot that can provide instant answers to common insurance-related queries.

As a user, I want to have the option to enroll in automatic premium payments to avoid the risk of policy lapses.

As a user, I want to be able to submit feedback or complaints regarding my claims experience directly through the web application.

As a user, I want to have access to a user-friendly interface that guides me through the claim's submission process step-by-step

As a user, I want to receive notifications about potential discounts or savings opportunities.

As a user, I want to have access to a knowledge base of articles and resources related to insurance claims, coverage options, and industry news.

Product backlog:

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User Authentication and Authorization:

As an admin, I want to be able to log in securely to the system.

As a user, I want to log in securely to access the system.

Claim Submission and Review:

As an admin, I want to review submitted claim documents for completeness and accuracy.

As an admin, I want to request additional information from customers if necessary.

As an admin, I want to have the ability to approve or deny claims based on policy criteria.

As an admin, I want to generate payments for approved claims accurately and efficiently.

As a user, I want to submit claim documents easily through the web application.

Claim Status Updates:

As a user, I want to receive timely updates on the status of my submitted claim.

As a user, I want to view the history of my past claims and their statuses.

As a user, I want to view my submitted claims and their statuses.

User Support:

As a user, I want to be able to contact customer support for assistance with my claim.

As a user, I want to reset my password if I forget it.

Profile Management:

As a user, I want to update my profile information if needed.

Notification System:

As a user, I want to receive notifications about important updates or changes in the system.

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Help Documentation:

As a user, I want to access help documentation or tutorials to understand how to use the system effectively.

Appendix 2 – User Story Tests

Admins

Admin Login

As an admin,

I want to log in securely,

So that I can access the system.

Scenario: Successful login with valid credentials

Given the admin is on the login page,

When the admin enters valid credential,

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When the admin should be logged in and directed to the dashboard.

Scenario: Failed login with invalid credentials

Given the admin is on the login page.

When the admin enters invalid credentials

Then the admin should see an error message indicating invalid credentials

Feature: Claim Review

As an admin

I want to review submitted claim documents.

So that I can ensure completeness and accuracy

Scenario: Reviewing claim documents

Given the admin is logged into the system.

When the admin navigates to the claims review section

Then the admin should be able to view submitted claim documents

Scenario: Providing feedback on claim documents

Given the admin is reviewing claim documents.

When the admin identifies missing or inaccurate information

Then the admin should be able to request additional information from the customer

Feature: Additional Information Request

As an admin

I want to request additional information from customers.

So that I can complete claim processing

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Scenario: Requesting additional information

Given the admin identifies missing or unclear information in submitted claim documents.

When the admin requests additional information from the customer

Then the customer should be notified to provide the necessary documentation

Feature: Claim Approval/Denial

As an admin

I want to approve or deny claims.

So that I can ensure compliance with policy criteria

Scenario: Approving a claim

Given the admin reviews a submitted claim.

When the claim meets all policy criteria

Then the admin should be able to approve the claim

Scenario: Denying a claim

Given the admin reviews a submitted claim.

When the claim does not meet policy criteria

Then the admin should be able to deny the claim

Feature: Payment Generation

As an admin

I want to generate payments for approved claims.

So that I can ensure accurate and efficient processing

Scenario: Generating payment for an approved claim

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Given the admin approves a claim.

When the payment generation process is initiated

Then the payment should be generated accurately and efficiently

Feature: Claim Categorization

As an admin

I want to categorize claims based on urgency and priority.

So that I can streamline the processing workflow

Scenario: Categorizing claims

Given the admin is reviewing a claim.

When the admin categorizes the claim based on urgency and priority

Then the claim should be prioritized accordingly for processing

Feature: Claim Assignment

As an admin

I want to assign claims to specific processors or teams.

So that I can ensure efficient handling and resolution

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Scenario: Assigning claims to processors or teams

Given the admin is reviewing a claim.

When the admin assigns the claim to a specific processor or team

Then the claim should be routed to the designated entity for processing

Feature: Real-Time Claim Tracking

As an admin

I want to track the status of each claim in real-time.

So that I can ensure efficient resolution

Scenario: Tracking claim status

Given the admin is logged into the system.

When the admin navigates to the claim status tracking page

Then the admin should be able to view the real-time status of all claims

Feature: Claim Processing Analysis

As an admin

I want to analyze claim processing metrics.

So that I can identify bottlenecks and areas for improvement

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Scenario: Analyzing claim processing metrics

Given the admin has access to claim processing data.

When the admin reviews the metrics and analytics

Then the admin should be able to identify bottlenecks and areas for improvement

Feature: Claim Processing Audits

As an admin

I want to conduct periodic audits of claim processing procedures.

So that I can ensure compliance with regulations

Scenario: Conducting claim processing audits

Given the admin is responsible for auditing claim processing procedures.

When the audit is initiated

Then the admin should be able to review and assess compliance with regulations

USER

Feature: User Login

As a user

I want to log in securely.

So that I can access the system

Scenario: Successful login with valid credentials

 Given the user is on the login page.

 When the user enters valid credentials

 Then the user should be logged in and directed to the dashboard

Scenario: Failed login with invalid credentials

 Given the user is on the login page.

 When the user enters invalid credentials

 Then the user should see an error message indicating invalid credentials

Feature: Claim Submission

 As a user

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I want to submit claim documents easily.

So that I can request reimbursement efficiently

Scenario: Uploading claim documents

  Given the user is logged into the system.

  When the user navigates to the claim submission page

  And uploads the required documents.

  Then the documents should be successfully submitted

Scenario: Missing required documents

  Given the user is logged into the system.

  When the user tries to submit the claim without all required documents

  Then the user should see an error message prompting to upload missing documents

Feature: Claim Status Updates

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As a user

I want to receive timely updates on my claim status.

So that I can stay informed about the progress

Scenario: Receiving status updates via email

 Given the user has submitted a claim.

 When the status of the claim changes

 Then the user should receive an email notification about the status update

Feature: Claim History

As a user

I want to view the history of my past claims.

So that I can track their statuses and details

Scenario: Viewing past claims

 Given the user is logged into the system.

 When the user navigates to the claim history page

 Then the user should see a list of all past claims with their statuses

Scenario: Accessing claim details

 Given the user is logged into the system.

 When the user clicks on a specific claim

 Then the user should see detailed information about the selected claim

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Feature: Customer Support

As a user

I want to contact customer support for assistance.

So that I can get help with my claim

Scenario: Contacting customer support via support ticket on the site

Given the user needs assistance with a claim.

When the user submits a support ticket on the website

Then the user should receive a confirmation of ticket submission

And a support agent should be assigned to address the ticket promptly.

Feature: Password Reset

As a user

I want to reset my password securely.

So that I can regain access to my account

Scenario: Resetting password via email verification

Given the user is on the login page.

When the user clicks on the forgot password link

And enter their email address.

Then the user should receive an email with instructions to reset the password

Feature: View Submitted Claims

As a user

I want to view my submitted claims and their statuses.

So that I can track their progress

Scenario: Viewing submitted claims

Given the user is logged into the system.

When the user navigates to the submitted claims page

Then the user should see a list of all submitted claims with their statuses

Feature: Update Profile Information

As a user

I want to update my profile information.

So that I can keep it accurate and up to date

Scenario: Updating profile information

Given the user is logged into the system.

When the user navigates to the profile settings page

And updates their information.

Then the user's profile should be updated successfully

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Feature: System Notifications

As a user

I want to receive notifications about important updates or changes in the system.

So that I can stay informed

Scenario: Receiving system notifications

Given the user is logged into the system.

When there are important updates or changes

Then the user should receive notifications via email or within the application

Feature: Help Documentation Access

As a user

I want to access help documentation or tutorials.

So that I can understand how to use the system effectively

Scenario: Accessing help documentation

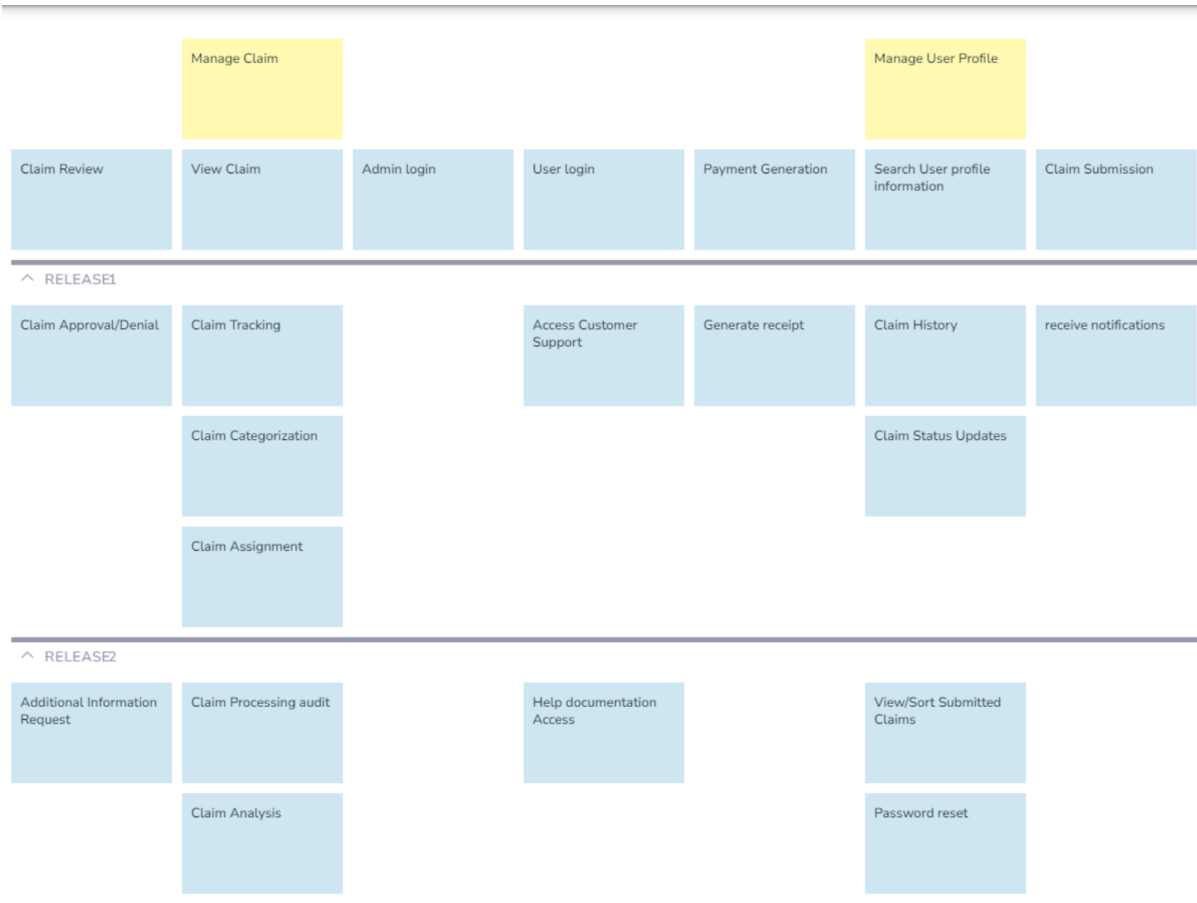Given the user is logged into the system.

When the user navigates to the help section

Then the user should be able to access FAQs, user guides, and tutorials.

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Appendix 3 – User Story Map

Claim Review	View Claim	Admin login	User login	Payment Generation	Search User profile information	Claim Submission

Manage Claim

Manage User Profile

∧ RELEASE1

Claim Approval/Denial	Claim Tracking		Access Customer Support	Generate receipt	Claim History	receive notifications
	Claim Categorization				Claim Status Updates	
	Claim Assignment					

∧ RELEASE2

Additional Information Request	Claim Processing audit		Help documentation Access		View/Sort Submitted Claims	
	Claim Analysis				Password reset	

Choice of tool

To make the story map we used a website called Cardboardit which is an online platform to create notes. It is used for brainstorming, project management and Agile development. It has a predefined template for user story maps which made our work much easier.

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