

Lesson 13 Forms

13.1 Requirements

You will view forms in the base configuration and configure a form pattern for a personal auto policy. You will also configure a form pattern for additional LOB's (if time permits).

13.2 View form patterns

1. Log in as su/gw (superuser)
2. Go to Administration → Business Settings → Policy Form Patterns
3. Find the Businessowners policy line form pattern with Form Number BP0001. Answer the following questions:
 - a) What is the name of the form?
 - b) Is the Policy Change tab available for this form? How do you know?
 - c) When can a form be inferred during a job? Where do you specify that information?
 - d) Where do you specify form inference conditions?

13.3 Configure a form pattern for personal auto policies

Enigma Fire & Casualty has a form requirement for personal auto policies. Add the form *Notice of Oregon No-Fault Laws* at quote time for vehicles in Oregon.

13.3.1 Add a form pattern



1. Log in as su/gw (superuser)
2. Start by configuring a form pattern in Administration → Business Settings → Policy Form Patterns
3. Specify the following details:
 - o Form name: Notice of Oregon No-Fault Laws XX (XX is your student ID)
 - o Form code: PA_OR_XX_Ext
 - o Form number: PA OR 00 XX
 - o Edition: 0100
 - o When to infer: When the policy is quoted
 - o Select the appropriate Product
 - o Be sure to add at least Submission as the Policy Transaction Types

- Availability: Only available in Oregon

13.3.2 Verification

- 1. Log out and then log back in using your studentXX login**
- 2. Start a new personal auto submission with a car garaged in Oregon**
 - Create a new person account with an address in Portland, Oregon.
 - Create a new Personal Auto submission and ensure the base state is in Oregon.
 - Add a driver with the license state in Oregon.
 - Add a vehicle and ensure that both the garaging and licensing state are in Oregon.
- 3. Quote the policy**

Trouble shooting: If you get an Underwriting Issue for “Inconsistent garaging ZIP code”, you can either try to approve the issue by going to **Risk Analysis → UW Issues** or update the driver’s license, vehicle’s garaging and licensing state to all be in the same state.

Ensure the submission is quoted successfully.

- 4. Verify that the “Notice of Oregon No-Fault Laws XX” form is added to the policy**

Forms			
Forms			
(1 - 7 of 7)			
Form #	Description	Endorsement #	Replacing #
PA 00DS	Dec Sheet		
PA 0209	LIMITED MEXICO COVERAGE		
PA 0272	PERSONAL AUTO POLICY		
PA 0285	PIP - OREGON		
PA 0433	UNINSURED MOTORISTS		
PA OR 00 01	Notice of Oregon No-Fault Laws 01		
PF 01	Common Policy Conditions		

13.4 Challenge: Form patterns for other LOBs

Repeat Exercise 12.3 for a LOB of interest to you.

- Which LOB did you select?
- What is a common form for the LOB you chose?

- c) What challenges did you face while creating the form pattern, if any?
- d) Were you able to verify the addition of the form to the policy of your LOB? How did you do it?



13.5 Solutions

13.5.1 View form patterns

1. Log in as superuser su/gw
2. Go to Administration → Business Settings → Policy Form Patterns
3. Find the Businessowners policy line form pattern with the Form Number BP0001

Answer the following questions:

- a) What is the name of the form?

Businessowners Coverage Form

- b) Is the Policy Change tab available for this form? How do you know?

Yes, because it is one of the transactions listed in the Transaction Types tab.

- c) When can a form be inferred during a job? Where do you specify that information?

Forms can be inferred at quote and bind time. Whether to infer a form at quote time or both quote and bind time is specified on the Basics tab by the Boolean question “Any data related to this form collected after quote?”

- d) Where do you specify form inference conditions?

The Inference Tab provides some common inference conditions.

13.5.2 Configure a form pattern for personal auto policies

1. Log in as superuser su/gw
2. Start by configuring a form pattern in Administration → Business Settings → Policy Form Patterns
3. Specify the following details:
 - o Form name: Notice of Oregon No-Fault Laws XX
 - o Form code: PA_OR_XX_Ext
 - o Form number: PA OR 00 XX

- o Edition: 0100
- o When to infer: When the policy is quoted
- o Endorsement number: Does not need to be issued
- o Availability: Only available in Oregon

Example:

New Policy Form Pattern

[Up to Policy Form Pattern](#)

Basics	Products	Transaction Types	Jurisdictions	Inference
Code	*	PA_OR_01_Ext		
Number	*	PA OR 00 01		
Edition	*	0100		
Name	*	Notice of Oregon No-Fault Laws 01		
Any data related to this form collected after quote?	*	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Assign an endorsement number to this form?	*	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Priority	*	-1		
Integration Fields				
Reference Code				

Basics	Products	Transaction Types
Products	Transaction Types	
<input style="background-color: #4CAF50; color: white; border: none; padding: 5px; margin-right: 10px;" type="button" value="Add"/> <input style="border: none; padding: 5px;" type="button" value="Remove"/> ⚙	<input style="background-color: #4CAF50; color: white; border: none; padding: 5px; margin-right: 10px;" type="button" value="Add"/> <input style="border: none; padding: 5px;" type="button" value="Remove"/> ⚙	
<input type="checkbox"/> Product	<input type="checkbox"/> Policy Transaction Type	
<input type="checkbox"/> Personal Auto	<input type="checkbox"/> Submission	
	<input type="checkbox"/> Renewal	
	<input type="checkbox"/> Rewrite	

Basics Products Transaction Types **Jurisdictions** Inference

Rows are sorted by order of evaluation
Start Dates are inclusive, End Dates are exclusive

Availability Table		Add	Duplicate	Remove
Available?	Start Date*	End Date	Jurisdiction	
<input type="checkbox"/> Yes	01/01/2000		MM/dd/yyyy	Oregon

Jurisdictional Replacements

Group Code	
This form is the jurisdiction-specific version of:	<none>

Basics Products Transaction Types Jurisdictions **Inference**

Forms are only inferred when Product, Transaction Types, and Jurisdiction criteria also match.

Policy line	Personal Auto Line
Form inference conditions	No additional criteria

13.6 References



Review

What is a form and how do you add it to a policy?

Forms are documents detailing specific aspects of the policy. Forms contain legal information about a policy and are part of the policy contract.



Review

A list of inferred forms is stored in the database for each policy period. The actual form content is created in the document production system by merging the policy data with the form template associated with the form on the policy.

PolicyCenter generates forms based on details that the user has specified. The process of determining what forms should be generated is called **form inference**.



Find

For more information about form multiplicity, refer to PolicyCenter documentation. Some business cases may require multiple instances of the same form. For example, a personal auto policy with multiple vehicles may require a single form for each vehicle. PolicyCenter supports form multiplicity, but it does require configuration.



Best Practice

Permissions and forms

To access the form administration user interface, users must log in as a user with the appropriate permissions, which are:

- **formpatcreate:** permission to create new form patterns
- **formpatview:** permission to access the forms editor and view existing form patterns
- **formpatedit:** permission to edit existing form patterns
- **formpatdelete:** permission to delete existing form patterns



Stop