

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			
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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?