PAS Signature Series Common Library
Capping

Version: 2.5
Last Updated: May 14, 2015

Overview
This is wireframe constitutes the Capping function for the Signature Series Common Library.

For all wireframes in this set
- Type of form field element is shown in wireframe
- Default values and associated text are as shown
- Drop-down values are in business requirements
- Links, buttons, errors and conditional states are in wireframe notes

Change Log

Version	Date	Name	Description
1.0	2/3/2012	Elizabeth Wen Tell	Document created
1.1	3/29/2012	Elizabeth Wen Tell	Add inline help icon to "Capped" under Premium Summary
1.2	5/2/2012	Elizabeth Wen Tell	Changing capping screen to a pop-up instead of a page per discussion with development. Capping on Vehicle tabe next to vehicle name due to developement limitation.
1.3	10/15/2012	Elizabeth Wen Tell	To include changes in CR90
1.4	2/26/2015	Sachin Kittur	Updated view capping details pop up screen
1.5	3/2/2015	Sachin Kittur	Updated view capping detail labels and notes
1.6	3/5/2015	Sachin Kittur	Added new label and notes, removed vehicle table from view capping details pop up
1.7	3/6/2015	Venkat tatituri	Removed help Icon for capping details
1.8	3/10/2015	Venkat Tatituri	Remvoed page 8, Updated capping details header
1.9	3/20/2015	Sachin Kittur	Updated manual capping factor note
2.0	3/20/2015	Venkat Tatituri	Updated Manual Capping Notes
2.1	4/29/2015	Venkat tatituri	Added Capping Override Reason Dropdown
2.2	5/1/2015	Venkat tatituri	Added Program Code Dropdown
2.3	5/6/2015	Venkat tatituri	Removed Program code and made as read only in View capping details screen
2.4	5/8/2015	Venkat Tatituri	Updated Notes for 9, 10. Right Aligned Money column
2.5	5/14/2015	Venkat Tatituri	Added Source Premium / Renewal Term premium - Old Rater section

Endorsement - 5 vehicle example

					Quote	

| Prefill | General | Driver | Driver Reports | Vehicle | Forms | **Premium & Coverages** | Documents | Bind |

Coverage and Premium Details

Coverages from Prefill ?

Bodily Injury Limits: $200,000/$200,000

Policy Options

Policy Term   [XXXXXX ▼]

Payment Plan *   [XXXXXX ▼]

Renewal Term Premium - Old Rater

Renewal Term Premium – Old Rater *   [XXXXXX]   **1**

Policy Level Liability Coverages ?

Description	Policy Coverage Limits	Pre-Endorse. Premium ?	Term Premium ?	Actual Premium ?
Bodily Injury Liability ?	[XXXXXX ▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Property Damage Liability ?	[XXXXXX ▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Uninsured/Underinsured Motorist Bodily Injury ?	[XXXXXX ▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Medical Payments ?	[XXXXXX ▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Policy Level Liability Coverages		**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

Detailed Vehicle Coverages

2000 TOYOTA CAMERY LE 4D	Vehicle Coverages	Pre-Endorse. Premium	Term Premium	Actual Premium
Comprehensive Deductible ?	[▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Full Safety Glass ?	[No Coverage ▼]	No Coverage	No Coverage	No Coverage
Special Equipment * ?	[(Default value)]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Collision Deductible ?	[▼]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Rental Reimbursement ?	[No Coverage ▼]	No Coverage	No Coverage	No Coverage
Towing and Labor Coverage ?	[No Coverage ▼]	No Coverage	No Coverage	No Coverage
Waive Liability ?	○ Yes ● No	N/A	N/A	N/A
Vehicle Coverage		**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

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Notes

1 **Renewal Term Premium - Old Rater**
This editable field shows the source premium that can be manually edited. It becomes disabled after "Calculate Premium" button is clicked.

This field is displayed to authorized users only.

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Notes

2010 CHEVROLET CORVETTE 2D	Vehicle Coverages	Pre-Endorse. Premium	Term Premium	Actual Premium
Comprehensive Deductible (?)	[dropdown]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Full Safety Glass (?)	No Coverage	No Coverage	No Coverage	No Coverage
Special Equipment * (?)	(Default value)	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Collision Deductible (?)	No Coverage	No Coverage	No Coverage	No Coverage
Waive Liability (?)	● Yes ○ No	N/A	N/A	N/A
Vehicle Coverage		**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

2012 ACURA MDX 4D	Vehicle Coverages	Pre-Endorse. Premium	Term Premium	Actual Premium
Comprehensive Deductible (?)	[dropdown]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Full Safety Glass (?)	No Coverage	No Coverage	No Coverage	No Coverage
Special Equipment * (?)	(Default value)	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Collision Deductible (?)	[dropdown]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Rental Reimbursement (?)	No Coverage	No Coverage	No Coverage	No Coverage
Towing and Labor Coverage (?)	No Coverage	No Coverage	No Coverage	No Coverage
New Car Added Protection Coverage (?)	Yes	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Purchase Date	02/12/2012			
Waive Liability (?)	○ Yes ● No	N/A	N/A	N/A
Vehicle Coverage		**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

2012 HONDA ACCORD LX 4	Vehicle Coverages	Pre-Endorse. Premium	Term Premium	Actual Premium
Comprehensive Deductible (?)	[dropdown]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Full Safety Glass (?)	No Coverage	No Coverage	No Coverage	No Coverage
Special Equipment * (?)	(Default value)	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Collision Deductible (?)	[dropdown]	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Rental Reimbursement (?)	No Coverage	No Coverage	No Coverage	No Coverage
Towing and Labor Coverage (?)	No Coverage	No Coverage	No Coverage	No Coverage
Vehicle Loan/Lease Coverage (?)	Yes	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Waive Liability (?)	○ Yes ● No	N/A	N/A	N/A
Vehicle Coverage		**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

Calculate Premium   Override Premium

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▶ **Payment Plans**

Term Premium by Vehicle				2

View Rating Details | View Capping Details | View Rules Override

Total Term Premium $X,XXX.XX	Veh 1 **2000 TOYOTA CAMERY 4D**	Veh 2 **2010 CHEVROLET CORVETTE 2D**	Veh 3 **2012 Acura MDX 4D**	Veh 4 **2012 HONDA ACCORD LX 4D**
Policy Level Liability Coverages	**Term Premium**	**Term Premium**	**Term Premium**	**Term Premium**
Bodily Injury Liability $50,000/$100,000	$X,XXX.XX	No Coverage	$X,XXX.XX	$X,XXX.XX
Property Damage Liability $25,000	$X,XXX.XX	No Coverage	$X,XXX.XX	$X,XXX.XX
Uninsured/Underinsured Motorist Bodily Injury $50,000/$100,000	$X,XXX.XX	No Coverage	$X,XXX.XX	$X,XXX.XX
Medical Payments No Coverage	$X,XXX.XX	No Coverage	$X,XXX.XX	$X,XXX.XX
Vehicle Coverages				
Comprehensive Deductible	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Full Safety Glass	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Special Equipment	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
Collision Deductible	$X,XXX.XX	No Coverage	$X,XXX.XX	$X,XXX.XX
Rental Reimbursement	No Coverage	No Coverage	No Coverage	No Coverage
Towing and Labor Coverage	No Coverage	No Coverage	No Coverage	No Coverage
Vehicle Loan/Lease Coverage	No Coverage	No Coverage	No Coverage	$X,XXX.XX
New Car Added Protection Coverage	No Coverage	No Coverage	$X,XXX.XX	No Coverage
Waive Liability	No	Yes	No	No
Total Vehicle Term Premium	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**

Forms	**Term Premium**
ADBE	$XX.XX

Fees	**Term Premium**
SR22	$XX.XX

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Notes

2   **View Capping Details Link**
Clicking this link opens the Capping lightbox and grays out the browser window web page.

View Capping Details link is only enabled for users that have the authority to see or edit capping details.

View Capping Details link should not be displayed to unauthorized users.

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Discounts & Surcharges

Discounts: AAA Membership, Home, Smart Driver (James Taylor, John Taylor), Airbag (Veh 2)

Surcharges: Foreign License Surcharge (Jim Smith)

Removed Vehicles	Date Removed	Actual Premium
2004, Honda Accord LX 4D	04/23/2012	$232.10
2006, Ford Mustang GT 2D	02/12/2012	$365.00

Additional Savings Options

Would you like to see how additional discounts could lower this premium?　○ Yes　　◉ No

Continue

Notes

Page Description: Users with proper authority level can view this page when they click the View Capping Details link and make changes to the Applied Capping Factor by entering a value in the Manual Capping Factor (%) field.

The size of the pop-up box, excluding the standard scroll bar at the right, shall be 820px wide, so to fit all the pertinenat information in the pop-up without users having to scroll horizontally.

Notes

3 **Manual Capping Factor (%)**
This field is available to edit to users with "Edit Capping Factor" privilege. Users can enter a number up to 2 decimal points into the Applied Capping Factor text field.

When an entry is input into the Manual Capping Factor (%) field,
1. the Applied Capping Factor value, the Capped Term Premium value and all values under the Capped Term Premium table shall blank out to zero.
2. the system shall generate the name of the user that is logged in, in the Authorized By field.
3. the "Capping Override Reason" drop down field becomes enabled and required.

The user shall click on the Calculate button to initiate calculation.

Once calculation is achieved, the Applied Capping Factor value, the Capped Term Premium value and all values under the Capped Term Premium table, that had zeroed out previously, shall display the new calculated capped values on the screen.

4 **Authorized By**
When an entry is made in the Manual Capping Factor (%) field, the system shall generate the name of the user that is logged in, in the Authorized By field.

5 **Other Reason**
When the user selects 'Other' value from "Capping Override Reason" drop down field, the "Other Reason" field becomes enabled and required.

▶ **Payment Plans**

Premium Summary by Vehicle

View Rating Details | View Capping Details | View Rules Override

View Capping Details ⊗

Capped Policy Premium

Renewal Term Premium – Old Rater ?	$X,XXX.XX	System Calculated Capping Factor	XX.XX%
% Change in Policy Premium ?	XX%	Applied Capping Factor ?	XX.XX%
Prior Term Capping Factor	XX.XX%	Calculated Term Premium ?	$X,XXX.XX
Ceiling Cap %	XX%	Capped Term Premium ?	$X,XXX.XX
Floor Cap %	XX%	Program Code ?	LegacyConv

3 **Manual Capping Factor (%)** `90.50`   **4** **Authorized By** `Jason Harms`

Capping Override Reason * `Other ▾`

5 Other Reason *
```
[                    ]
```

| Return to Premium & Coverages | Calculate | Save and Return to Premium & Coverages |

Policy Level

Bodily Injury
$50,000/$100,

Property Dan
$25,000

Uninsured/U
$50,000/$100,

Medical Payn
No Coverage

Vehicle Cov

Comprehensi

Full Safety G

Special Equip

Collision Ded

Rental Reimb

Towing and L

Vehicle Loan/Lease Coverage	No Coverage	No Coverage	No Coverage	$X,XXX.XX
New Car Added Protection Coverage	No Coverage	No Coverage	$X,XXX.XX	No Coverage
Waive Liability	No	Yes	No	No
Total	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX

▶ **Payment Plans**

Premium Summary by Vehicle

View Rating Details | View Capping Details | View Rules Override

Total P

View Capping Details   ✗ 9

Capped Policy Premium

10 Renewal Term Premium – Old Rater ?	**$X,XXX.XX**	System Calculated Capping Factor	**XX.XX%**
11 % Change in Policy Premium ?	**XX%**	Applied Capping Factor ?	**XX.XX%**
Prior Term Capping Factor	**XX.XX%**	Calculated Term Premium ?	**$X,XXX.XX**
Ceiling Cap %	**XX%**	Capped Term Premium ?	**$X,XXX.XX**
Floor Cap %	**XX%**	**13** Program Code ?	**LegacyConv**

Manual Capping Factor (%) `90.50`   **Authorized By** `Jason Harms`

12 Capping Override Reason * `Other ▾`

Other Reason * [   ]

Return to Premium & Coverages 6	**Calculate** 7	**Save and Return to Premium & Coverages** 8

Policy Lev

Bodily Injury
$50,000/$100,0

Property Dar
$25,000

Uninsured/U
$50,000/$100,

Medical Payn
No Coverage

Vehicle Cov

Comprehensi

Full Safety G

Special Equip

Collision Ded

Rental Reimb

Towing and L

Vehicle Loan/Lease Coverage	No Coverage	No Coverage	No Coverage	$X,XXX.XX
New Car Added Protection Coverage	No Coverage	No Coverage	$X,XXX.XX	No Coverage
Waive Liability	No	Yes	No	No
Total	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**	**$X,XXX.XX**
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX
	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX	$X,XXX.XX

Notes

6 Return to Premium & Coverages
Brings user back to the Premium & Coverages page. If changes were made, the system will not save the changes.

7 Calculate
Initiates the applicable calculations based on the Manual Capping Factor (%) input, and returns calculated values in the Applied Capping Factor field, the Capped Term Premium field and all values under the Capped Term Premium table.

If there are multiple vehicles that have input values in the Manual Capping Factor (%) field, the calculate button shall calculate for all vehicles.

8 Save and Return to Premium & Coverages
System shall save the changes made within the pop-up window and the new calculations, close the pop-up window, and return the user to the Premium & Coverages page.

The Preimum & Coverages page shall refresh with the new capped premium calculations when the pop-up closes.

9 ✗
If user uses this button to close the View Capping Details pop-up window, no data will be saved and user will return to the Premium & Coverages page with original data and calculations.

10
11
This field will display a value when system uses % increase-decrease in Premium logic to calculate Capping Factor. The values will show up for first conversion policy or when the "restart capping" flag = yes and it is the first time this policy's policy effective date falls within the date range in the configuration table

12 When the user enters a value in the Manual Capping Factor (%) field, the "Capping Override Reason" drop down field becomes enabled and required.

13 Displays the source of the book of business.

Notes

2.1

Manual Capping Factor (%) | 90.50   **Authorized By** | Jason Harms

Capping Override Reason * | Other ▾

Other Reason *

2.1 **Manual Capping Factor (%)**
For users that only have authority to see the View Capping Details page but does not have authority to make changes, the Manual Capping Factor (%) field shall be disabled.

4.1

Manual Capping Factor (%) | 90.50   **Authorized By** | Jason Harms

Capping Override Reason * | System Calculation Error ▾

4.1 **Capping Override Reason**
When the user enters a value in the Manual Capping Factor (%) field, the "Capping Override Reason" drop down field becomes enabled and required.

4.2

Manual Capping Factor (%) | 90.50   **Authorized By** | Jason Harms

Capping Override Reason * | Other ▾

Other Reason *

4.2 **Other Reason**
When the user selects 'Other' value from "Capping Override Reason" drop down field, the "Other Reason" field becomes enabled and required.