Forms Experts Program

Domain Name: Forms Page

Document Control Information

Document Information

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| Document Name | Forms Experts Output\_ Forms Page |
| Document Author | Ankita Reshu |
| Document Version | 1.0 |
| Date Released | 07/30/2013 |

Document Edit History

| Version | Date | Additions/Modifications | Prepared/Revised by |
| --- | --- | --- | --- |
| 1.0 | 07/30/2013 | Initial version | Ankita Reshu |
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1. Functional Domain

The functional domain covered is the Forms Page with Story ID 880-820[State Identifier].

The State Identifier varies from one state to another. Currently we are leveraging CL version 3.0 of

Forms Page Combo to proceed with the state specific Forms Page Combo.

2. Business Justification

**Forms Page**

After the user enters all information related with Policy, Vehicle and Driver in PAS and clicks on Continue, he lands on the Forms Page. It consists of three sections depending on different types of forms displayed. They are Policy forms, Vehicle forms and Driver forms.

Driver forms and Vehicle forms section also displays the associated Drivers and Vehicles added on the policy.It displays required/optional forms for a policy.

The most important source of information of the forms to be covered in the Policy, Vehicle and Driver sections in the Forms Page Combo are the three tabs on the Auto Product Lookup. They are Policy,Vehicle and Driver Endorsements tabs in the lookup. We have to capture information of Value and Description exactly from these three tabs.

The table below gives a brief description of the various stories to be covered while writing US-VC for Documents Page Combo for any State.

|  |  |
| --- | --- |
| **CL story** | **Description** |
| 880-820-A-#CL | A – Field Validation & Page Functionality  This story talks about Forms page fields and buttons. The significance of the three sections – Policy , Vehicle and Driver forms is covered. Besides sub-sectiions in each section is covered with explanation about the “View/Edit”, “Add to Policy” and “Remove from Policy” hyperlinks. |
| 880-820-B-#CL | B – Policy Forms  This story talks about AA01 and NANO forms. AA01 should not be displayed and only when Policy type = “Named Non-Owner” shall NANO forms be displayed. |
| 880-820-C-#CL | C – Vehicle Forms  This story talks about the various Vehicle forms. The coverages need to be selected from Premium & Coverages Page and then the corresponding forms are listed in this section. |
| 880-820-D-#CL | D – Driver Forms  This story talks about the various Driver level forms. Depending on the selection on the Driver Page, the forms are listed in this section. |

3. List of forms covered under the domain

Here only those forms are listed which are common to all states or mentioned in 880-820CL

| Form No. | State initials | Form Name |
| --- | --- | --- |
| AAAD | All states | Automobile Death Benefits Endorsement |
| AASR22 | All states | SR-22 Financial Responsibility Form |
| AA59 | All states | Existing Damage Endorsement |
| AALP | All states | Loss Payable Endorsement |
| AA09 | All states | Special Equipment Coverage |
| AA47 | All states | Towing & Labor Costs |
| AA49 | All states | Rental Car Reimbursement Coverage |
| AACL | All states | Vehicle Loan/Lease Protection Coverage |
| AANC | All states | New Car Added Protection |
| AASG | All states | Full Comprehensive Safety Glass Coverage |
| AA01 | All states | Personal Automobile Policy |
| AA41 | All states | Non-Owner Automobile Endorsement |

4. Analysis of Business Requirements

## **4.1** Common Requirements

| Form No. | Form Name | Form Description and its Business Use |
| --- | --- | --- |
| AAAD | Automobile Death Benefits Endorsement | * Appears in Forms Page in the section Driver forms, story number 880-820-D-#CL |
| AASR22 | SR-22 Financial Responsibility Form | * Appears in Forms Page in the section Driver forms, story number 880-820-D-#CL |
| AA59 | Existing Damage Endorsement | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AALP | Loss Payable Endorsement | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AA09 | Special Equipment Coverage | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AA47 | Towing & Labor Costs | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AA49 | Rental Car Reimbursement Coverage | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AACL | Vehicle Loan/Lease Protection Coverage | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AANC | New Car Added Protection | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AASG | Full Comprehensive Safety Glass Coverage | * Appears in Forms Page in the section Vehicle forms, story number 880-820-C-#CL |
| AA01 | Personal Automobile Policy | * Should not appear in Forms Page in the section Policy forms, story number 880-820-B-#CL |
| AA41 | Non-Owner Automobile Endorsement | * Appears in Forms Page in the section Policy forms, story number 880-820-B-#CL |
|  |  |  |
|  |  |  |

**Auto Product Lookup analysis**

The form name and description has to be captured exactly from the form value and description columns in the Lookup sheet. One should refer to the Policy, Driver and Vehicle Endorsement tabs in the sheet for this purpose.

Please refer to the attached screenshot for data elements related to each section on Forms Page and Page validation links.



Please find attached snapshots from PAS of Forms Page for a CT Policy.



## 4.2 Related Change Requests (if any)

| CR No. | CR Name | States Impacted | CR Description and its Business Use |
| --- | --- | --- | --- |
| CR 0420 | Additional VCs added to 070-244CL | CL | * Adding VCS to story 070-244CL:   VC3: Special Equipment Endorsement  VC4: Towing & Labor Costs  VC5: Rental Car Reimbursement Coverage  VC6: Vehicle Loan/Lease Protection  VC7: New Car Added Protection  VC8: Full Comprehensive Safety Glass |
| CR0495 | Remove the Named Driver Exclusion Form from CL Stories | CL | * The Named Driver Exclusion Form is state specific and should not be included in the Common Library. |
| CR0504 | Remove the UM/UIM forms from CL Stories. | CL | * The UM/UIM forms are state specific and should not be included in the Common Library. |

5. Key Understanding of Design requirements, (form wise)

### System/UI Impact

| Page |  | Correlation with other UI Pages |
| --- | --- | --- |
| Forms | |  | Area of concern is the Forms Page itself. | |
|  | |
| Documents | |  | The Forms page is different from the Documents Page.The Documents Page is divided into two sections - Documents Available for Printing and Required to Bind section. All documents are listed in the Forms page but their generation is possible only from the Documents Page. Both Forms and Documents Page list default and conditional documents. | |
|  | |
| GODD | |  | Forms Page and GODD Page do not have much functional similarity. Unlike the GODD Page documents can be generated Ad-hoc from the GODD Page. | |
|  | |
| Related UW Rule/Task | |  | N/A | |
|  | |

### Signature Rules(if any)

* N/A

### Document Content and Applicable Triggers

* The Forms Page is navigated through @ Quote, New Business, Endorsement, Renewal
* One cannot generate a document from Forms Page but can only view them.
* Vehicle level forms are displayed on Forms Page only after we select the Vehicle Coverages on the Premium & Coverages Page.
* Forms Page is accessible both before and after Policy creation.

**5.1.4 Key pointers to keep in mind**

* The Name and Description displayed in every section on Forms Page should exactly match the Value and Description captured in the Auto Product Lookup document.
* The Policy, Driver and Vehicle Endorsement tabs in Auto Product Lookup should be analyzed to ensure that both default and conditional forms are mentioned.
* The latest version of 880-820CL should be downloaded from EKM and leveraged.

**6. Reference to Documents**

| Document Name | Document Description |
| --- | --- |
| [**https://ekmaaa.exigenservices.com/EKMWiki/index.php/880-820CL\_Consolidated\_Form\_Stories\_-\_Forms\_Page**](https://ekmaaa.exigenservices.com/EKMWiki/index.php/880-820CL_Consolidated_Form_Stories_-_Forms_Page) | Link for 880-820CL document |
| <https://ekmaaa.exigenservices.com/EKMWiki/index.php/Common_Library_Product> | Link for Auto Product Lookup |

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